**User Story Number:** USIN-027

**User Story Name:** Prevent HMS Source from Auto-updating

**Backlog ID: 54**

**Backlog Priority:**

**Initial Sizing Estimate:**

**Rational ID:**

**Rally ID:** US191

**Author:** eInsurance

# Background:

Prevent buffer entries with a source of ‘HMS’ from ever auto-updating to patient file. Insurance verification management needs a way to capture any entry made by HMS that is the same as a patient's existing insurance policy to ensure a refund is requested for that entry.

Details: The Health Management System (HMS) is a source of entry in the insurance verification processor file. These insurance buffer entries are identified by an external contractor each month for patients who have had appointments in the last X days and currently don’t have identified insurance on the patient insurance sub-file in the VA database. The entries are automatically uploaded to the buffer. Currently HMS sourced entries are supposed to ‘hold’ in the buffer for the first 24 hours before a 270 is created. This allows CPAC verification staff to identify (capture in a report) all HMS entries as these need to be tracked for reporting purposes.

Typically, after the initial uploaded, the next nightly buffer extract would pick up all entries (if capable) for electronic eligibility inquiries. At this point, the HMS sourced buffer entries follow the same rules as any other entry and may return ‘active,’ ‘inactive,’ ‘reject’ or even ‘auto-update’ when warranted. (The contractor is only supposed to identify and provide active insurance policies NOT already on the patient sub-file, so theoretically auto-update would never happen because the patient must already have a policy for auto-update to work). However, this isn’t always the case. When HMS sourced entries auto-update, it is more difficult to track those entries and request credit.

# Story:

As the CPAC Insurance verification department, I do not want buffer entries with a source of ‘HMS’ to auto-update, so that I can ensure credits are appropriately captured and refunded when the policy already exists on the patient’s sub-file.

# Conversation:

* In order for a policy to auto-update:
  + a ‘matching’ policy must already be present on the patient sub-file
  + the payer returning the 271 response is flagged as ‘trusted’ by FSC
* Some HMS entries might be a result of another insurance import (pre-reg, registration, RQI, etc. process). These aren’t ‘true’ HMS entries and are easily identified because of a different ‘date entered’ and ‘entered by’ user. This scenario is not the best situation to use for testing. Continue to treat this scenario as an HMS entry (even if not part of batch processing) and don’t auto update.
* We do not want to break the auto-update process for other entries. Look at the source of information and prevent only HMS entries from auto-updating.
* HMS sourced entries should still go through the normal eIV process.
* Source of information file: 355.12

1 INTERVIEW

2 DATA MATCH

3 IVM

4 PRE-REGISTRATION

5 eIV

6 HMS (This is the only one to prevent from auto-update)

7 MEDICARE

8 ICB CARD READER

9 CONTRACT SERVICES

1. E-PHARMACY

11 KIOSK

12 INTERFACILITY INS UPDATE

# Detailed Listing of Acceptance Criteria:

|  |  |  |
| --- | --- | --- |
| Requirement ID | Description | External Dependency  (Y/N)  If Y, provide organization and description |
| USIN-027.01 | Buffer entries marked with a source of HMS, with a matching active patient policy already on file, do not auto-update. |  |
| USIN-027.02 | Buffer entries marked with a source other than HMS will continue to auto-update as appropriate. |  |

# Constraints:

* Typically HMS entries upload on roughly the first day of each month. Will have to test when sites receive the upload. Be aware of this condition during IOC.
* Difficult to test in SQA account. (Need FSC assistance)
* Cannot test in MIRROR account because no eIV functionality.
* Not all payers are ‘trusted’ or allow for auto-update; site may not have any entries for trusted payers. (Matching policy is on file, but didn’t auto-update because payer not trusted).

# Assumptions:

* Sites have HMS entries that normally would have auto-updated.
* Testing idea –User may be able to create new buffer entry in VistA for a policy that would normally auto-update and select HMS as source.

# Risks:

* HMS sourced entries that continue to auto-update may reduce the refunds from a contractor back to the VA. We’ll be paying for things we already know exist.

# Approval Signatures

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**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 10/27/2016 | v0.01 | Original | eInsurance |
| 12/1/2016 | V0.02 | Updating | Cindy Fawcett |
| 12/12/2016 | V1.0 | Final version for submission | Team Leidos |