**User Story Number:** USIN-070

**User Story Name:** Covered by Health Insurance Indicator

**Product Backlog ID: 420**

**Backlog Priority:**

**Initial Sizing Estimate:**

**Rational ID:**

**Rally ID:**

**Service Request Number:**

**Author:** eInsurance

# Background (If helpful, otherwise delete)

The flag for ‘Covered by Health Insurance’ (YES/NO) in the patient file, field (2.3192) should coincide with the patient insurance type sub-file effective and expiration dates. The field is owned by eIV. When a patient has no insurance, the flag states NO, and when an active policy is loaded, the flag automatically changes to YES. When all policies are terminated (expired) by humans, the flag automatically changes to NO.

There are two scenarios where this flag/indicator is not accurate:

1 – When policies are intentionally entered on the patient with future expiration dates: The day after the future expiration date occurs, the Covered by Health Insurance flag does not change to NO as would be expected when all policies are expired. Modify the flag behavior to automatically set NO if there are no active polices on file for that patient.

2 – When policies are intentionally entered on the patient with future effective dates: When the future effective date occurs, the Covered by Health Insurance flag does not change to YES as would be expected when a policy is active. Modify the flag behavior to automatically set YES if an active policy is on file for that patient.

# Story

As an entry clerk, I want the Covered by Health Insurance indicator to automatically update per the effective and expiration dates of policies so that my daily worklist is accurate.

# Conversation

Without any user intervention, the Covered by Health Insurance indicator should automatically update per the effective and expiration dates of policies.  This flag isn’t working correctly.

The flag needs to be updated automatically. During elaboration, there was group discussion about using a background process. The development team will consider using and possibly adding an index to make sure the background process is not too system intensive. When the patch is initially installed, the process will have to run through all of the patients to evaluate policies and adjust the flag as necessary. The development team will investigate ways to make sure the initial pass is not too system intensive. For example, the initial pass may occur over multiple nights. The solutions will be addressed in the design and may be different from the discussion during elaboration.

*Technical Note:* possibly evaluate IB\*2\*549 or IB\*2\*579 for background job behavior and system intensity of those patch install times. Similar policy expiration date & flag setting behavior occurred for those patches.

A user can view the insurance flag on Patient Information screen, screen five in registration.

*Technical Note*: Covered by Health Insurance = 2.3192

*Example*:  The flag indicates YES 'today' but there is a policy with a future expiration date. This flag doesn’t switch to NO once the expiration date plus 1 is reached.

**Example 1:** FUTURE TERM DATE

PI > PI > VP > ED

EFFECTIVE DATE OF POLICY: JAN 1,2016//

INSURANCE EXPIRATION DATE: AUG 4,2017//

SOURCE OF INFORMATION:

STOP POLICY FROM BILLING: NO//

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Insurance Management for Patient: TEST,PATIENT xxxx M/DD/YYYY

Insurance Co. Type of Policy Group Holder Effect. Expires

1 HUMANA COMPREHENSIVE M GRP NUM 11 SELF 01/01/16 08/04/17

2 MEDICARE (WNR) MEDICARE (M) PART B SELF 01/01/16 07/06/99

View Registration Data (DG Registration View)

INSURANCE DATA, SCREEN <5>

TEST,PATIENT; xxxxxxx NSC VETERAN

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<1> Covered by Health Insurance: YES

{Note: Covered by Health Insurance should be NO on 8/5/2017}

# Detailed Listing of Acceptance Criteria

|  |  |  |
| --- | --- | --- |
| Requirement ID | Description | External Dependency  (Y/N)  If Y, provide organization and description |
| USIN-070.01 | Covered by Health Insurance indicator displays NO when an active policy is entered with a future effective date (and no other active policy exists).  On the future effective date, the indicator becomes YES. |  |
| USIN-070.02 | Covered by Health Insurance indicator displays YES when an active policy is entered with a future expiration date (and no other active policy exists).  The day after the future expiration date, the indicator becomes NO. |  |
| USIN-070.03 | Covered by Health Insurance indicator displays YES when an active policy is entered with a past effective date and no expiration date (note: this is the only current working scenario) |  |

# Tester Notes:

* Testing will require multiple days. Add future expiration dates and note Covered by Health Insurance indicator. The indicator won’t change until the day after the expiration date. Add future effective dates and note the Covered by Health Insurance indicator. The indicator won’t change until the day of the effective date.
* It is possible to ‘trip’ the Covered by Health Insurance indicator by manually expiring all policies and/or removing expiration dates from policies. (Should be done in TEST accounts only).

# Constraints:

# Users do not have access to edit registration information.

* Related to US198, Automatically create verification entry for future policies (USIN-86). US118 has to be completed before US198 or both user stories need to be in the same build.

# Assumptions:

* Warranty patch IB\*2\*579 will be nationally released.

# Risk:

* Continuing to allow false reporting of indicator affects downstream data reports of number of patients covered by health insurance (a nationally reported value).
* Continuing to allow false reporting of indicator leaves patients off the insurance collection list (insurance collection GUI relies on this indicator to flag the patient for insurance collection when the indicator is NO).
* Continuing to allow false reporting of indicator leaves patients on the insurance collection list after buffer entries auto-update because the GUI expects a buffer entry to remain in the buffer or verification of No Insurance, when the indicator says NO.
* IOC risk: Production systems are not allowed to modify the insurance expiration and effective date on real patients. There may be test patients that sites can use during IOC. It would be helpful to have advance programmer access to identify real patient scenarios to watch after the patch is installed.

# Approval Signatures

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**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 10/20/2016 | v0.01 | Original | eInsurance |
| 11/4/2016 | V0.02 | Incorporate changes from USD&P meeting | Cindy Fawcett |
| 11/9/2016 | V1.0 | Final version for submission | Team Leidos |
| 11/21/2016 | V2.0 | Incorporated changes from rejection | Cindy Fawcett |