

[Provider Background Checks/Licenses BR]

Clockify Project/Task:	Custom eLG Software Development
Requester:	[REDACTED] (r)
Priority:	
Related Features:	
Expected Client	
Delivery/Project Hours Allocated:	
Additional References:	
Business	
Analyst:	SG

Contents

Change Log	2
General Information/Overview	3
Business Requirements	4

Change Log

#	Date	REF #	Previous	New	RQ/C	Writers	Solutions	UI/UX	CTO
MM/DD/YYYY			INITIAL INTERNAL SIGN-OFF						

General Information/Overview

Summary	The Provider Background Checks and Licenses Management feature allows admins to upload, tag, and track background checks and licenses for providers via the Files section. Admins can assign metadata (e.g., issue date, expiration date, status) and set reminders for renewals to ensure compliance.
Problem	Admins need a centralized location to manage and track provider background checks and licenses to ensure compliance. Without a way to monitor expirations and statuses, tracking these documents becomes cumbersome.
Goal	Allow admins to upload and manage background checks and licenses, assign tags for tracking (e.g., completion status, expiration date), and set automatic notifications for expiring documents.
Scope	<ul style="list-style-type: none"> Upload background check and license documents to the Files section. Assign metadata (e.g., issue date, expiration date, status). Set notifications for document expirations. Providers can view their documents but cannot edit or delete them.
Risks	N/A
Key Terms/Definitions	<p>Background Check: A document that verifies a provider's criminal record status.</p> <p>License: A document verifying a provider's authorization to operate.</p>
Policies/Rules/Flags	<ul style="list-style-type: none"> Only admins can upload, tag, or delete background check and license documents. Providers can view but cannot edit or delete these documents. Notifications for document expirations must be triggered 30 days before expiration.
Feature Flow	<ol style="list-style-type: none"> Admin logs into the system. Admin navigates to the "Provider Profile" and selects the "Files" section. Admin uploads background check and license documents. Admin assigns metadata (e.g., issue date, expiration date, status). System tracks documents and sends notifications 30 days before expiration.

Business Requirements

Location (s): Provider Record > Documentation > Files

Assumption/Precondition: Admin must have the appropriate permissions and be logged into the system.

BR 1: Provider Background Checks and Licenses Management

UC 1: Admin Uploads Background Checks and Licenses

US 1: As an admin, I want to upload provider background checks and licenses so that these documents are stored and tracked for compliance.

- Admin logs into the system and navigates to the Provider Profile.
- Admin selects the "Files" section and clicks "Upload" to select the background check or license document.
- Admin tags the document with appropriate metadata such as document type (e.g., "Background Check" or "License"), issue date, and expiration date.
The document is stored under the "Background Checks and Licenses" folder.
-

UC 2: Admin Tags and Tracks Background Checks and Licenses

US 2: As an admin, I want to tag background checks and licenses with metadata so that I can track their status and compliance.

- Admin assigns relevant metadata (e.g., "Completed" or "Pending" status).
- Admin tracks the expiration date for licenses and uses tags like "Expiring Soon."
- Admin filters and searches documents by tags or expiration dates to monitor compliance.
- Admin sets reminders for expiring background checks and licenses.

UC 3: Provider Views Background Checks and Licenses

US 3: As a provider, I want to view my background checks and licenses in the Files section so I can ensure my documents are up to date.

- Provider logs into the system and navigates to the "Files" section under their profile.
- Provider views background checks and licenses stored in the "Background Checks and Licenses" folder.

- Provider cannot edit or delete these documents but can see their status (e.g., "Completed" or "Expired").

UC 4: Admin Sets Notifications for Expiration of Licenses and Background Checks

US 4: As an admin, I want to set notifications for upcoming expirations of licenses and background checks so that providers are reminded to renew.

- Admin configures notification rules for license and background check expiration dates.
- Admin sets up reminders to alert providers and admins (e.g., 30 days before expiration).
Notifications are automatically sent with instructions for renewal.
- The notifications link to the relevant documents within the provider's profile.