

Add-On Requirements

Target release	V.1.8
Jira Item	OnBase Add-Ons To Do
BA	Tiara Green
UX	
Developers	

Current Process:

When a HBA or CR receive a case that, A) already completed the 1st level needs to reassign to another HBA or B) received a case in error, each individual has to wait until a supervisor is available to reassign cases.

Future Process:

Action feature will allow HBAs and CRs to reroute cases to one another or to a different department without sending over to a supervisor to do so. The tab will be located next to routing to clinical and intake.

Goal:

To help with productivity, allowing the staff to be more self-efficient and cut down on turnaround times.

Out of Scope:

1. The ability for a HBA and CR to be more productive with researching.
2. Identify trends and a keep metrics in compliance.

Requirements

ID	User Story	Importance	Notes
1	As a HBA/CR, I shall have the ability to search by claim number, member name, and appeal identifier so I can become familiar with case.	Must	Example: Case assigned by intake, HBA completed 1 st level. Example: Case assigned from intake, procedure code needs to be reviewed by CR.

2	As a HBA/CR, I shall have the ability to search OnBase, so I can provide findings after research.	Should	Example: After the HBA/CR research case, notate account.
3	As a HBA/CR, I shall have the ability to route case to the correct department or assignee.	Should	Have access with no limitations to be able to reassign case.
4	As a HBA/CR, I shall have the ability to notate the account and close out at an appropriate timeframe.	Should	Make sure before reassigning that notes are on the account. Please explain the reason for reassigning the case. Please be mindful of the case deadline.
5	As HBA/CR, I shall have the ability to know that the case will be complete after reassigning in a timely manner.	Should	Case reassigned and routed to the appropriate department and will be close.

Acceptance Criteria:

- When I type in a particular HBA/CR, then I should be able to see a list of assignees.
- When I type in a particular code, I should be able to see denial code and assign to the correct individual.
- When I click on the action button to route to another individual, I should be able to do so.