Architect Review Board Evaluation Scenario
Patient Travel Support Foundation
PRACTICE

Project Overview

The Patient Travel Support Foundation (PTSF) is a not-for-profit organization that helpspeople (patients) in remote regions access medical treatments that aren't available locally. PTSF does this by subsidizing patient travel costs (bus, train, or plane fare).

PTSF is headquartered in Singapore and operates across the APAC, EMEA, and AMER regions. PTSF has 10 satellite offices in each of their regions that cover a defined geographical area. In those satellite offices, applications for travel are received, approved,and booked.

PTSF has grown to 3.5 million patients during their 5 years of operation. With their current processes being managed by bespoke systems that run locally at each satelliteoffice, PTSF understands that their current systems and processes will not scale any further and would like to move appropriate data and processes to the Salesforce platform.

Users of the System

PTSF has the following types of customers & partners:

1. Patients that apply for transport subsidies
2. 4000 Medical Practitioners that assess the candidate's eligibility for the medicaltreatment

PTSF has around 500 internal users that will need to use the new system:

1. Assessors that review subsidy applications and assessments from Medical Practitioners.
2. Managers that look after Assessors and can approve more expensive subsidy applications, and the supporting management hierarchy that runs the business.

Current Systems

1. Travel Application Management System (TAMS) is a bespoke system that currentlystores all subsidy applications. This system is deployed locally at each satellite office. Each satellite office has customized to their unique needs.

2. A website provides static content, downloadable PDF medical assessment forms,and FAQs to help patients and Medical Practitioners understand the process.

3. Each region maintains a separate Active Directory instance. The new system should authenticate Internal users using credentials using their appropriate ActiveDirectory Instance.

4. Health Insurance Checker is a global API service that verifies a patient's health insurance entitlements. While a useful service, during peak times it can often takeup to 15 seconds to return results.

Business Process Requirements

Patient Onboarding

1. Patients must be able to create an account using their email address and passwordas well as Facebook.

2. On the first login, Patients must step through an onboarding wizard to complete their personal profile with information such as name, email, date of birth, address,language preference, and insurance.

   a. PTSF would like to prepopulate personal profile data with attributes returned by the Health Insurance Checker.

   b. PTSF would like to validate the physical address input by the patient.

   c. The patient cannot apply for a subsidy until the onboarding process is completed.

   d. Patients should receive a welcome email in their language of preference thatexplains the subsidy application process after onboarding is complete.

Requesting Travel Assistance

1. PTSF supports travel assistance for over 500 treatment types. Subsidy applicationsrequire the selection of a treatment type, the reason for the request, and medical history information.

2. Medical history information previously provided by the patient must be verifiedwith each subsidy application.

3. PTSF checks with the patient's health insurance to see if any travel costs can be covered as part of their insurance policy. If the health insurance provider coverstravel costs, the subsidy application should be automatically rejected.

4. When a subsidy application is created, a medical practitioner registered for that treatment type should automatically be allocated. The allocation should happen based on the closest distance between the medical practitioner's practice and thepatient's address.

5. The medical practitioner should be notified that an assessment of the patient is required and must accept the application within 3 business days; if no response isgiven, or the medical practitioner declines to assess, the system should reassign toanother medical practitioner using the same assignment logic.

6. If a patient or medical practitioner has any questions or problems, they would like to have the ability to chat with a PTSF assessor throughout the process. PTSF is alsokeen to understand if there are ways to deflect support requests for common questions.

Patient Assessment and Subsidy Application Approval

1. Currently, the Medical Practitioner downloads the appropriate medical assessmentform from the website, assesses the patient, then returns the completed PDF to the PTSF Assessor via email. While most forms are completed electronically, someare printed, filled out by hand, then scanned and manually entered in the system. PTSF would like to improve this error-prone process.

2. If an assessment is still "pending" 15 days after being assigned to a Medical Practitioner, the system should escalate to Team Managers who will follow up with the Medical Practitioner.

3. A Medical Practitioner may need an additional specialist to assess a particular aspect of the patient and should be able to request additional assessments for the subsidy application.

4. If a subsidy application is approved, the assessor will enter a subsidy amount granted. The system should help the assessor determine the appropriate subsidy amount given the distance to be traveled and the expected transportation type(s) involved (air, train, taxi, etc.)

Data

1. PTSF has 5 million patients distributed evenly across regions; it expects to grow by 50% each year over the next 5 years. On average 20% of total patients request a subsidy each year.

2. All existing patients, subsidy applications, and assessments should be migrated to the new system.

3. Any existing subsidy applications should be completed in the current system; on average the application process is completed in 1 month.

Visibility & Accessibility

● Medical Practitioners can see all assessments for patients related to a subsidy application they are assigned to.

● Medical Practitioners can only see the patient's name, phone, and email, as well as the patient description of services needed from the subsidy application.

● Medical Practitioners can see medical history for patients during the period where there is an open subsidy application where they are assigned an assessment. PTSF internal users cannot see medical history at all.