Attachment A: Request Type & User Group Matrix

The matrix below provides a list of the various request types to be supported within the proposed solution, with process notes and current estimated annual volume for the request. The request types are also denoted with anticipated access for the user group(s).

The access types are:
- S = Submit ➔ The user group will need the ability to initiate and submit the request type
- P = Process ➔ The user group will be involved in processing the request type, in some capacity
- V = View Only ➔ The user group will need the ability to view information, but will not need submission or processing capability

The following provides a list of the multiple request types to be supported within the proposed solution. For reference, the user groups are defined in RFP #20-063 section 3.2.

Req ID	Request Name	Process Description & Notes	~Annual Volume	User Group Access (Submit, Process, View Only)				
				Staff	Agency	Partner	Read Only	Public
1	**Medical Records Request**	Receive a medical records request from a patient, workflow for the fulfillment (providing the medical request to the submitter), attachment of documents, creation of a log detailing the release (who requested it, who released it, when, how, where was sent). Note: Operational process includes a requirement for a notary. Submissions from the public must be notarized.	156	P	P	S	V	S
2	**Feedback Submission (External)**	Submit & receive compliments (and complaints), workflow to the proper staff for review/investigation, document conclusions if applicable, and provide reports to support quality review activities.	208	S/P	S/P	S/P	S/V	S
3	**Employee Event Processing (Investigations)**	Submit, categorize & receive employee incidents, workflow to the proper staff for investigation, document conclusions, and provide reports to support quality and training activities. This will also include clinical investigation (will require HIPAA compliance.) Ex. A patient complains about a staff member's driving, and it must be logged for further investigation. _Note:_ Interface with File Handler/Risk Management is preferred, but not required. This will be needed, for scenarios such as Worker's Comp and any other issues that may impact County risk.	550	S/P	S/P	S/P	V	
4	**Device/Equipment Failure Logging**	Submit & receive device failure reports, workflow to the proper staff for investigation, document conclusions, and provide reports to support management decisions for device maintenance. Devices may include medical equipment (primarily), radios, computers.	56	S/P	S/P	S/P	V	
5	**Resource Request**	Submit & receive employee requests for uniforms and equipment, workflow, and provide order status updates to employees. Provide reports to support the management of these assets. Resources to be tracked include: Uniforms (set or individual components), phones, computers & accessories, and shift change/transfer. Used mostly for equipment replacement.	700	S/P	S			

#	Name	Description	Qty					
		Note: Interface with Operative IQ (hosted - asset tracking and inventory system) preferred, but not required to check asset availability and update stock amount if the asset is needed.						
6	**Issue Processing (Employee)**	Submit and receive internal requests from individuals in the organization for facility & fleet repair and maintenance. This includes workflow to the appropriate supervisor as well. (GSA requests, maintenance issues, "I need something fixed"). Used more for repair of equipment. Note: Interface with GSA Fleetwave & FM Interact when applicable.	1000	S/P	S/P	S		
7	**Fleet Status Logging**	Users log vehicle issues with status and location daily, used to identify vehicle profile, where trucks are assigned, and what vehicles are in/out of service. The log is needed to track and trend common issues.	4000	S/P	S/P			
8	**Training Accountability**	Acknowledgement of standards that apply to the employees.	150	S/P		S/P		
9	**Shift Summary**	Staff can complete and submit the shift details for logging purposes. The forms should be available for search and reporting functions. Access to shift summary data will be identified by various sub-categories (i.e. organizational level or location). May want to look for employee incidents (and other request types) logged and include by default when the shift summary is initiated.	11,000	S/P	S/P/V			
10	**Referral & Visits**	Form sent to notify staff of visit referral and provide a mechanism to schedule referrals. Need to also provide tracking of visits scheduled and notify staff before the visit is to occur, with ability to view referral requests on a calendar.	250	S/P	S	S		
11	**Medical Event Tracking (control log)**	Log of medical control requests and consultations. Includes EMS contractors (agencies) that don't have Wake network credentials.	500	P		P		
12	**Protocol Revision**	Staff and agency personnel submit protocol change requests/suggestions, with acknowledgement of receipt. Reviewers provide review status.	100	S/P	S	S		
13	**Contract/Requisition Requests**	Allow Deputy Directors to request the initiation of contracts and requisitions (BPOs / POs), so the Advantage requisition can be created and request status can be tracked.	170	S/P				