# Assignment #1 – Functional Requirements and RTM

## Section 1: Assignment Description

You are the project manager for Phase 1 of the Liberty Health Insurance (LHI) portal. The project has recently started. Your task is to define the functional requirements (FRs) and the requirements traceability matrix (RTM), based on the information provided in Section 2: Scope Description.

Instructions:

1. Use the templates and examples provided as documentation for Lesson 3
   - FRS for MCP Project.xlsx (for the functional requirements)
   - RTM for MCP Project.xlsx (for the requirements traceability matrix)
2. For Functional Requirements:
   - Enter one row in the FRs spreadsheet for each requirement listed in section 2, except for the high-level categories (which are numbered in section 2), which are: Employers, Members, Providers, and About Us
   - In the "Requirement Area" column, enter the high-level category to which the requirement applies to. For example, ***Employers*** is the "Requirement Area" for the ***Search Insurance Plans*** requirement.
   - For each requirement, you can use verbiage similar to the ones shown below (which is the same as the one used in the example files):

     The system will provide …

     The users will have the capability to …
   - Unless otherwise specified in section 2, the priority of a requirement is ***High***.
3. For Requirements Traceability Matrix:
   - List all column headers
   - Fill out only the first three columns:
     - ***Test Case #***
     - ***Scope / Summary Description***
     - ***Req #***
   - Test cases should be created as follows
     - One (1) test case for each requirement listed with a "filled" bullet ( • ) in Section 2.
     - Each test case should include all "child requirements", listed with an "empty" bullet ( ○ ) in section 2. Specifically, in the example below: the test case is ***Claims***, and it encompasses all requirement #s (in the FRs) that correspond to "***Claims***", "***Submit a new claim***", "***Check a claim status***", and "***Make a premium payment***"

| |
|---|
| • Claims<br>○ Submit a new claim<br>○ Check a claim status |

## Section 2: Requirements

# Assignment #1 – Functional Requirements and RTM

Liberty Health Insurance Ltd. (LHI) is a start-up health insurance company, which will provide medical and dental plan coverage to small businesses (and their employees) in selected US states.

Funded by a few venture capital firms, LHI is expected to "open for business" in winter 2018.

In preparation for this, the company's executive leadership identified that providing LHI's customers with an easy, intuitive access to LHI's health plan offerings, related services and other information is a critical, strategic initiative. LHI's main customer groups are *employers* (the businesses who signed up with LHI), *members* (the employees working for the small businesses who signed up with LHI), and *providers* (doctors and dentists who accept patients enrolled in an LHI insurance)

This above functionality will be made available via a to-be-developed web portal (aka **LHI Portal**). As the entire portal functionality would not be completed until winter 2019, it was decided to split the development and rollout in multiple phases.

**Phase 1**, to be completed in January 2018, will only deliver those features which are deemed critical (must haves) when LHI starts its operations, and which are described below:

1. Employers

   This category bundles the features available to those companies (employers) who signed up – or will sign up - with LHI. The major functional features are:

   - Account maintenance:
     - Create an employer account
     - Update an employer account
     - Close an employer account
   - Search the insurance plans offered by LHI, using either a Google-type search, or browsing through LHI's plan catalog.
   - Register / subscribe for the plans they want to make available to their employees
   - Review plan-related and other documentation
   - Wellness, which in turn includes:
     - Wellness Framework,
     - Wellness Start,
     - Wellness Improve

2. Members

   This category covers the functionality available to the employees who worked for a company who signed up with LHI, and includes:

- Account maintenance
  - Create an account with LHI
  - Update an account with LHI

- Benefit enrollment
    - Enroll in a plan
    - Change the plan selection
- Claims
    - Submit a new claim
    - Check a claim status
    - Make a premium payment
- Tools
    - Print Benefit Card
    - Doctor & Hospital Finder

### 3. Providers

Healthcare providers (e.g. doctors) use this set of features to:

- Enroll with LHI;
- Select which LHI insurance plans they will accept;
- Payment processing
    - Submit payment requests,
    - Check the status of a payment request
- Policies & Procedures (Priority: Medium)
    - Claim Submission & Billing, Inquiries (Priority: Medium)
    - Complaints & Appeals (Priority: Low)

### 4. About Us

This is an informative section, which provides relevant information about LMI:

- Location
- Mission Statement (Priority: Medium)
- Contact Us
- Executive Leadership Bios (Priority: Low)