

Process Design Document / Solution Design Document

Process Name: IAH – PHARM – 340B RETAIL PHARMACY

Purpose of Document

This document serves as the technology policies and procedure for Intelligent Automation Hub at Geisinger

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1. Document Control

Applies to:	All IAH RPA Operating Model
Classification:	Highly Confidential
Owner:	Intelligent Automation Hub Team

DOCUMENT HISTORY

Version	Date	Author	Approver	Reasons for Change
1.0				

REVIEW

Role	Name	Date
SME		
Process Owner		

STAKEHOLDERS

Role	Name	Email
Process Owner		
SME		
Process Architect		
IAH Director		
Developer		

2. Document Details

2.1 PURPOSE OF THIS DOCUMENT

This document intends to provide a detailed process and solution design proposal for robotics automation of the '340B Retail Pharmacy Audits'.

3. Current State Process Description

3.1 PROCESS SUMMARY

The 340B program provides a \$200 million annual benefit in pharmaceutical discounts. To ensure compliancy with the 340B Drug Pricing program Geisinger performs monthly audits to review prescriptions. Geisinger is responsible for monitoring and ensuring care site and contract pharmacy compliance with 340B program requirements. Geisinger utilizes Macro Helix to extract pharmacy data from Epic to create a monthly report that auditors work from. Approximately ten percent of outpatient prescriptions are reviewed each month. Geisinger is expected to report to HRSA any material breach of 340B program requirements. CMS guidelines also require Geisinger to recertify compliance with the 340B program annually. Geisinger must attest to full compliance with the 340B program during recertification, including compliance at contract pharmacies. In addition, as part of recertification, Geisinger agrees to self-report to HRSA when they uncover a breach of 340B program requirements. Automation, for the Phase 1, is going to Audit Hospital Qualified and Retail Pharmacy Audits monthly.

Data Flow & Applications

3.1.1 INPUT

Input	Format	Location	Is it natively digital?	Is it structured?
Excel Reports from MacroHelix	XISX	Macrohelix	Yes	Yes

3.1.2 OUTPUT

Output	Format	Location	Frequency	Comment
Process Report	Excel	Network Drive	Created monthly	Report of processed transactions
Audited Excel Reports	Excel	Network Drive	Created monthly	

Email	Outlook	Email	Created monthly	When PID's have no transaction When monthly run is complete
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3.1.3 APPLICATIONS

Application	Version	Interface	Req Key / Operation / URL	Comment
Excel	2016	Desktop Application	N/A	
Epic		Desktop Application	<IAHPHARM> and <IAHPHARM2>	
MacroHelix		Macrohelix website		
SP		340B SP Site		
Edge				Use for Internet Browser

3.2 BUSINESS RULES

Rule	Detail
Automation frequency	Monthly
Bot start time	5th or 15th day of each month to pull MacroHelix reports Bot will process audits after PID pulls
Excluding weekends and holidays	No
SLAs	Robot finished run by 25th of each month

3.3 CURRENT STATE METRICS

Avg. Monthly Transactions	# Batches Monthly	Avg. Volume / Batch	Weekly Avg. Volume	Frequency
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20,000	1	20,000		Monthly
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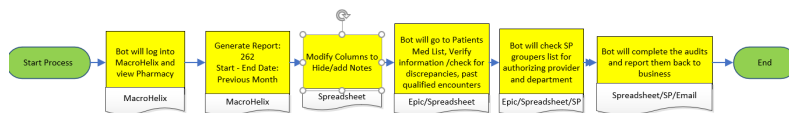
3.4 CURRENT STATE PROCESS FLOW

High Level Process Flow Diagram (Current state):

4. Future State Process Description

4.1 FUTURE STATE PROCESS FLOW

Bot Automation Process & Workflow Diagram (Future State):



1. Bot will log into MacroHelix and view Pharmacy.
2. Bot will generate and export the report: 262 for the previous month.
3. Bot will modify columns and add Notes column.
4. Bot will check Epic EHR for patient's med information/past encounters to verify/report discrepancies.
5. Bot will check SP groupers list for authorizing provider and department verification/reporting discrepancies.
6. Bot will complete the audits and report them back to business.

4.2 IN SCOPE FOR RPA

100% of current state process is in scope for RPA.

4.3 OUT OF SCOPE FOR RPA

The actions out of scope for RPA should be listed in the table below together with the reasoning.

Activity/Action	Reason for out of scope	Future State solution	Measures to be taken for future automation
TBD			

4.4 FUTURE STATE DETAILED STEPS

YELLOW –

- No Discrepancy
- Could not find the medication in Lexicomp
- When Bot finds qualified encounter and qualified documentation, in column Qualified Encounter: True, Bot found qualified encounter and documentation (Insert: Date/Department/Provider of qualified encounter) – and Keep it in Yellow tab
- If any discrepancy with Strength, Bot will keep it in the YELLOW and document in status column: Strength Discrepancy “Epic strength is__ and Macrohelix is ____”
- If Dispense discrepancy, Bot will keep it in the YELLOW and document in status column: Dispense Discrepancy “epic dispense ____ and Macrohelix is ____”
- If the microhelix provider NPI did not match Epic provider NPI, Bot will comment: Authorizing provider “Macrohelix Name” did not match Epic provider “Epic provider name” in the status column.

ORANGE:

- If Bot cannot find any free text documentation and cannot find a qualified encounter, in column Qualified Encounter: False, Bot couldn’t find qualified encounter
- If Bot couldn’t identify the unit of the medication, Bot will comment: Could not identify the Unit
- If Bot couldn’t identify the dispense of the medication, Bot will comment: Could not identify the Dispense
- If Bot cannot find any free text documentation but finds an encounter, Bot will put in Qualified Encounter column: True, found encounter but couldn’t find free text. (Insert: Date/Department/Provider of qualified encounter)

BLUE:

- If Bot cant find the medication, Bot will put it notes: Script not found in Epic (Insert: Medication).
- If Bot cant find the same written date, BOT will put in notes: Script not found in Epic (Insert: From Written Date).
- If no NPI available, and BOT finds more than 1 provider any of the lists, put in NOTES: Multiple providers found on lists (Insert provider name)
- Break The Glass patients
- Cannot find the patient in Epic

RED:

- If Bot cannot find the provider in the spreadsheets, Bot will type in the Notes ‘ineligible provider (provider name)’

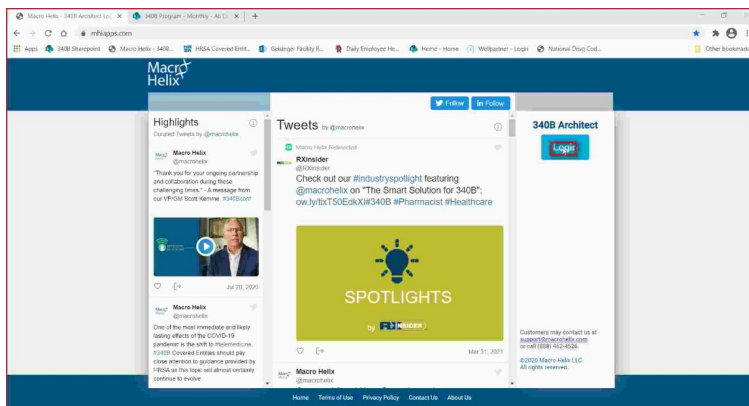
- If Bot cannot find the department in that spreadsheet, Bot will type 'ineligible dept (department name from Epic).

Copy/Paste

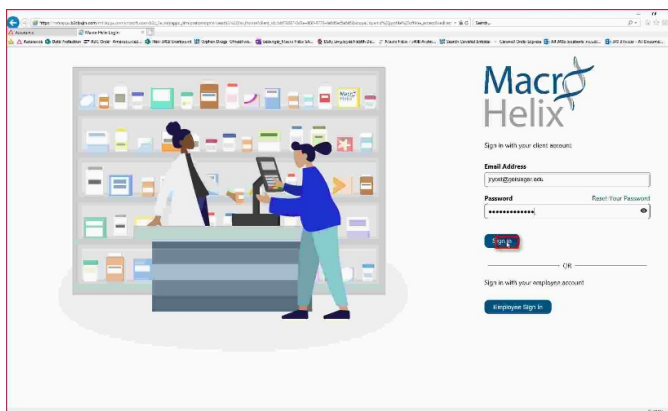
- Epic: "Paste Department name and number from Epic" if macrohelix has epic department blank
- If the report is blank or not downloaded (no data), Bot will alert the business in the beginning of the run (on the 5th or 15th) that those PID's did not have any data

FUTURE STATE:

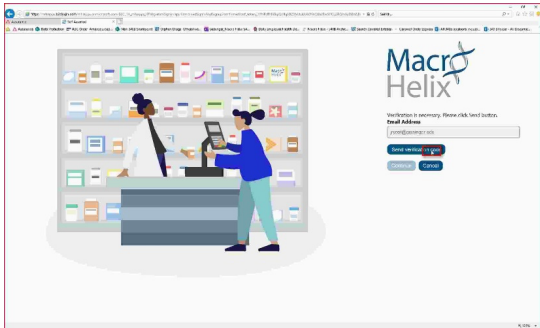
1. Bot will go to mhiapps.com and click Login



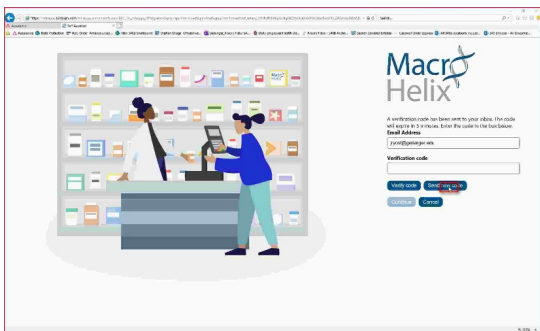
2. Bot will type user name and password and click Sign in



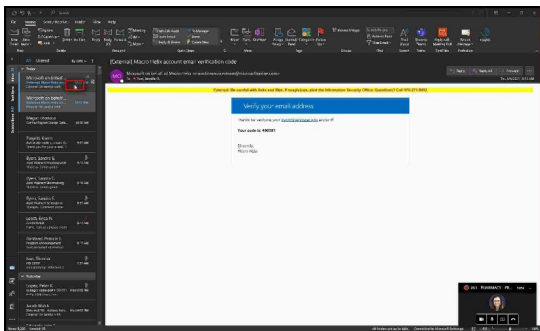
3. Bot will click Send verification code to the BOTs email



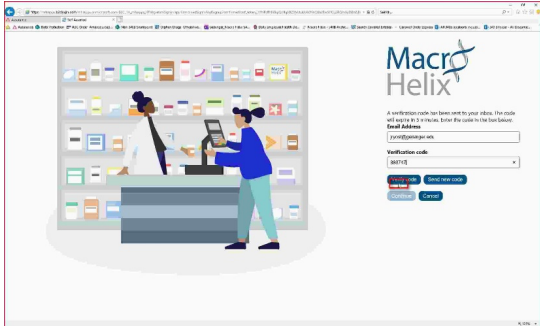
4. If Bot does not get the verification code, Bot will click Send New Code



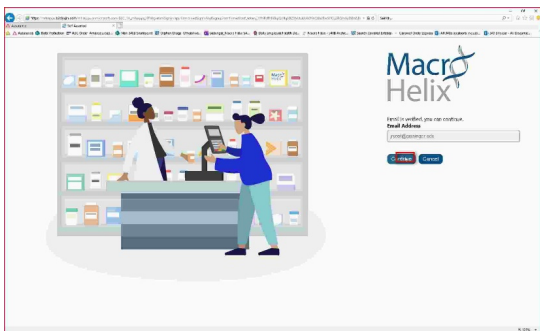
5. Bot will find the [External] Macro Helix account email verification code email and look at the Your code is: and copy it



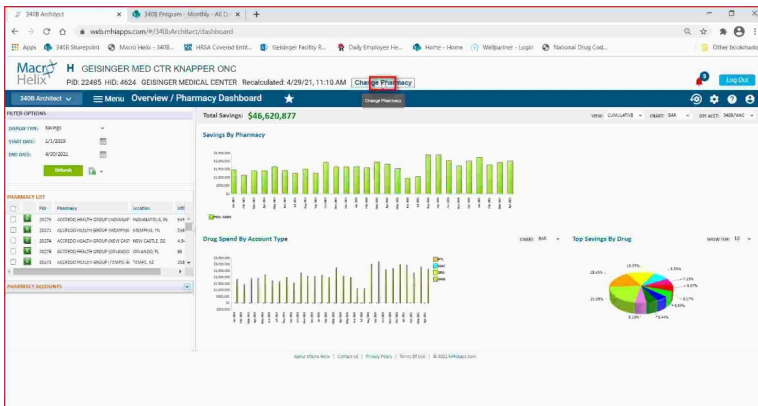
6. Bot will type the verification code and click Verify Code



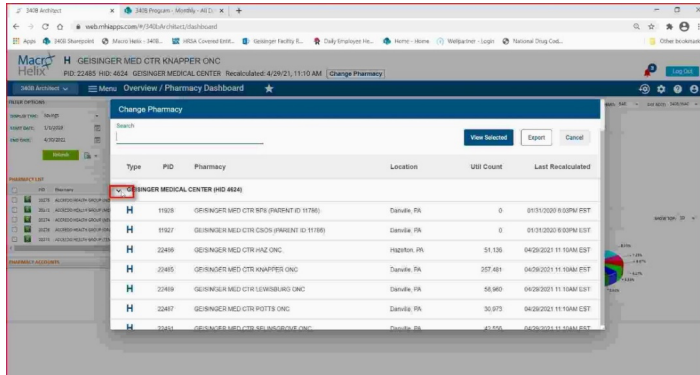
7. Bot will click continue



8. Bot will click Change Pharmacy



9. Bot will look at the dropdown and pick the first pharmacy from the “SP Retail Pharmacy List spreadsheet’



10. Bot will click the link and go to the Bot Audit Resources folder > “Pharmacies to Audit” document (the name of the file , minus the date)

- a. Link:
<https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B/SitePages/Home.aspx?e=1%3A50a55d1bbb0c4901a4b386341362acd5>

Pharmacies to Audit 5.13.21.xlsx	June 3	Kretzing, Larry
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11. Bot will grab the first pharmacy PID and pick that pharmacy in MacroHelix (RETAIL ONLY)

- a. PID _ column A
b. Audit Type _ column C (Retail)
c. Day of the month to pull the reports _ column E

A	B	C	D	E
PID	Pharmacy	Audit type	Hospital	Day of month report can be pulled from Macro Helix
33912	Perform Specialty, LLC (GMC)	retail	GMC	5
23303	Walmart 1644\Geisinger Medical Center	retail	GMC	15
23304	Walmart 1794\Geisinger Medical Center	retail	GMC	15
23305	Walmart 1887\Geisinger Medical Center	retail	GMC	15
23307	Walmart 2185\Geisinger Medical Center	retail	GMC	15
23309	Walmart 2481\Geisinger Medical Center	retail	GMC	15
22492	Geisinger Wyoming Valley- Mt Pocono Onc	Hem/Onc	GWV	5
22493	Geisinger Wyoming Valley - Tunkhannock Onc	Hem/Onc	GWV	5
34812	Geisinger Wyoming Valley Medical Center	epic	GWV	5
19922	Accredo Health Group (Indianapolis) Geisinger Wyoming Valley	retail	GWV	5

12. Bot will type the pharmacy PID

Change Pharmacy

Search

15617

View Selected

Export

Cancel

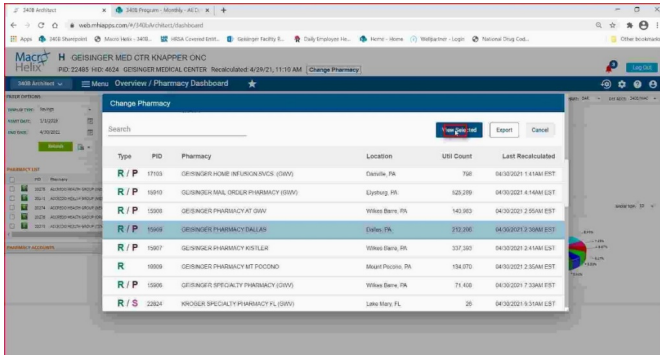
Type	PID	Pharmacy	Location	Util Count	Last Recalculated
GEISINGER MEDICAL CENTER (MD 4624)					
R / P	15617	GEISINGER MAIL ORDER PHARMACY (GMC)	Elysburg, PA	2,213,443	05/07/2021 7:14AM EST

13. Bot will click on the pharmacy name

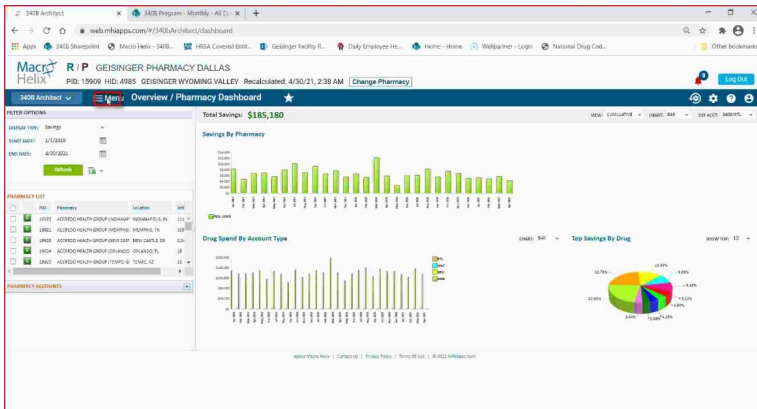
The screenshot displays the '348B Architect' application interface. The main window is titled 'Change Pharmacy' and contains a table of pharmacy records. The table has the following columns: Type, PID, Pharmacy, Location, Util Count, and Last Recalculated. The record for 'GEISINGER PHARMACY AT DFW' is highlighted. The background shows the application's sidebar menu and top navigation bar.

Type	PID	Pharmacy	Location	Util Count	Last Recalculated
R / P	17103	GEISINGER HOME INFUSION SVCS (DWS)	Davie, FL	766	04/30/2021 4:14AM EST
R / P	10910	GEISINGER MAIL ORDER PHARMACY (BROS)	Lynchburg, VA	525,209	04/30/2021 4:14AM EST
R / P	15988	GEISINGER PHARMACY AT DFW	Willesboro, PA	146,983	04/30/2021 2:55AM EST
R / P	15969	GEISINGER PHARMACY DALLAS	Dallas, TX	212,206	04/30/2021 2:38AM EST
R / P	13607	GEISINGER PHARMACY KISTLER	Willesboro, PA	337,380	04/30/2021 2:41AM EST
R / P	18008	GEISINGER PHARMACY MT POCONO	Mount Pocono, PA	134,070	04/30/2021 2:35AM EST
R / P	15906	GEISINGER SPECIALTY PHARMACY (DWS)	Willesboro, PA	71,408	04/30/2021 7:33AM EST
R / S	23824	KROGER SPECIALTY PHARMACY FL (GWS)	Lake Mary, FL	29	04/30/2021 9:35AM EST

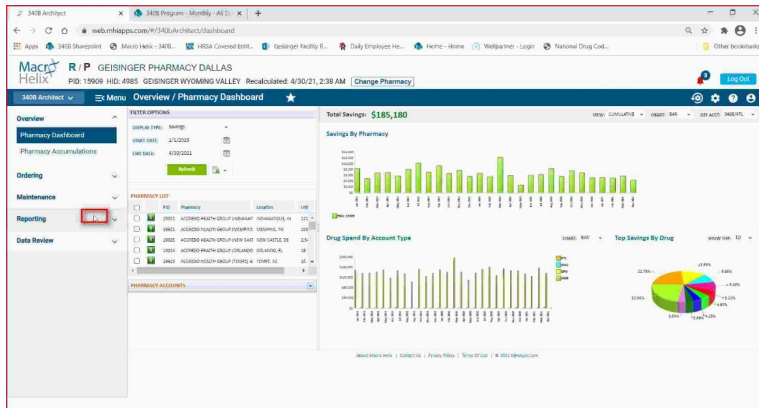
14. Bot will click View Selected



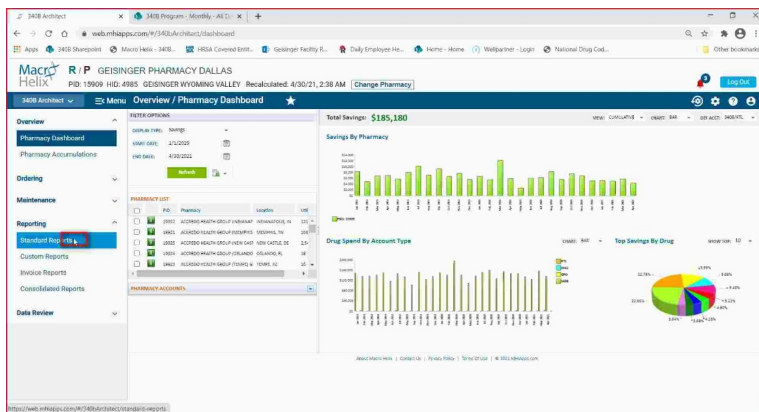
15. Bot will click on Menu



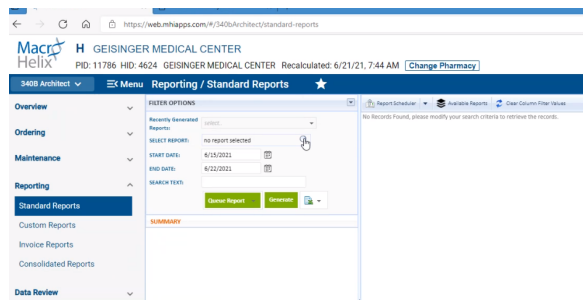
16. Bot will click on the arrow next to Reporting



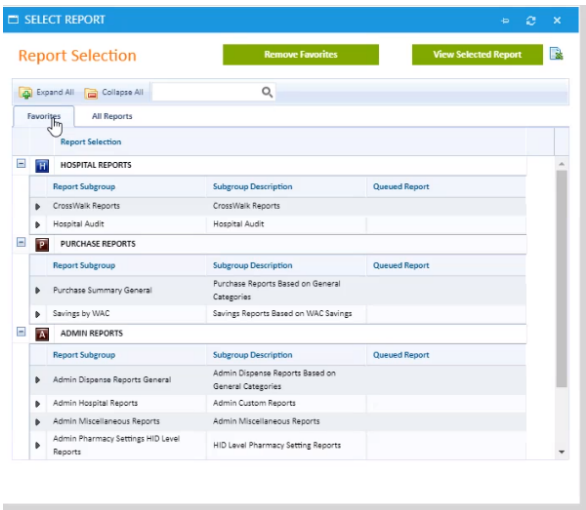
17. Bot will click on Standard Reports



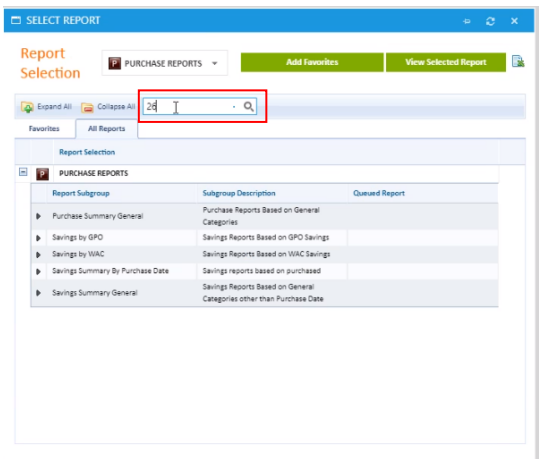
18. Bot will click on the magnifying glass next to Select report



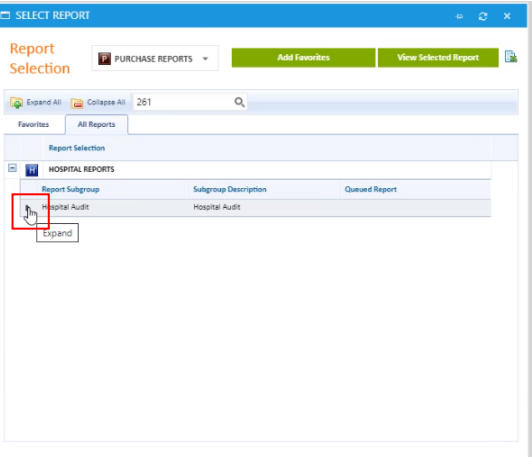
19. Bot will click All Reports



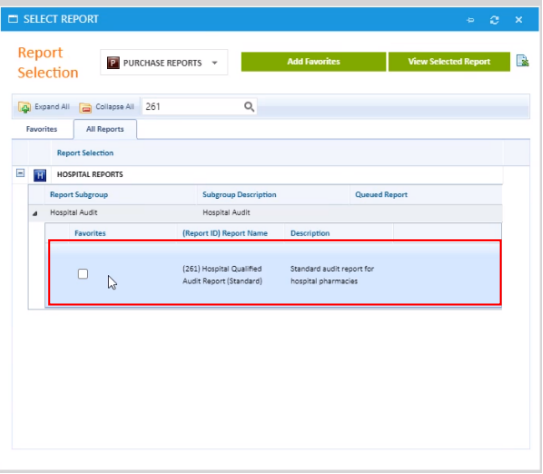
20. Bot will type 262 and click magnifying glass



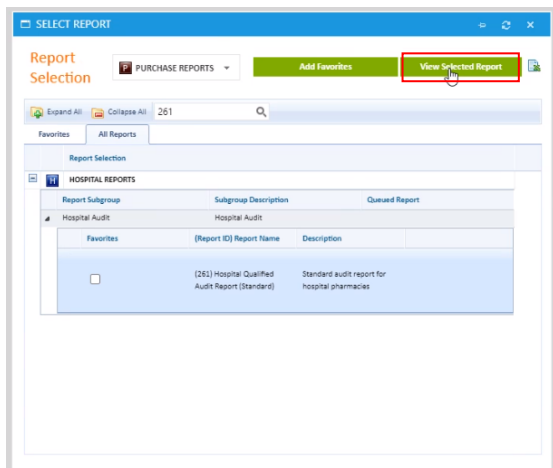
21. Bot will click on the arrow to expand



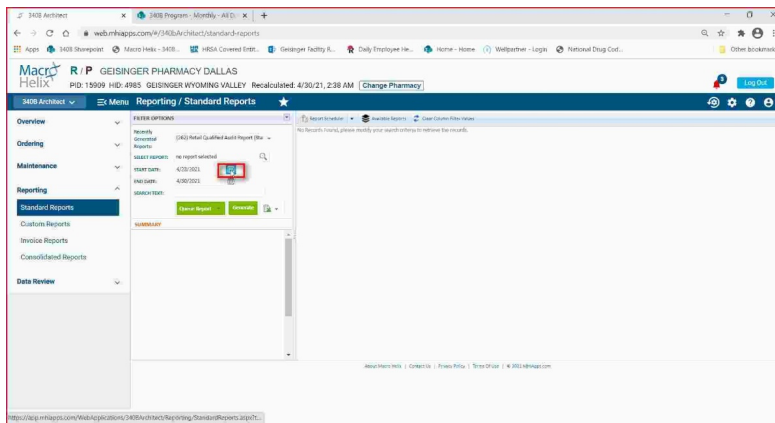
22. Bot will click on the report to highlight it



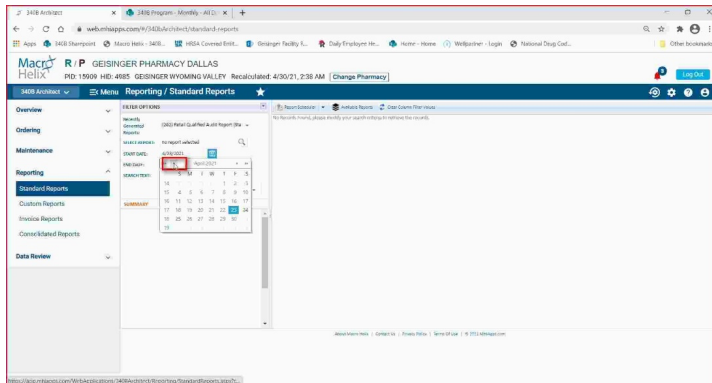
23. Bot will click View Selected Report



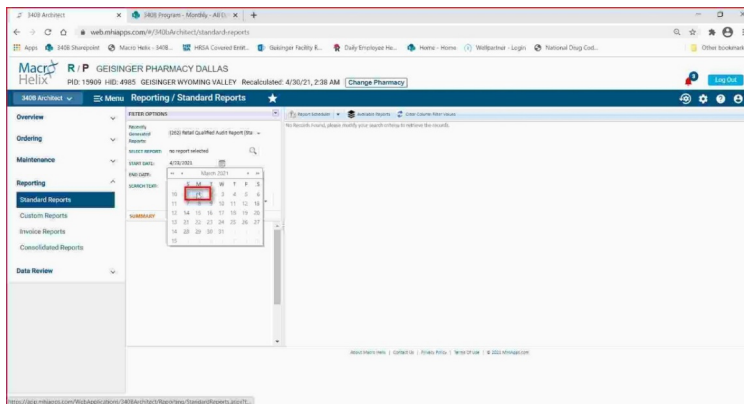
24. Bot will pick the start date by clicking on the calendar (first date of the previous month)



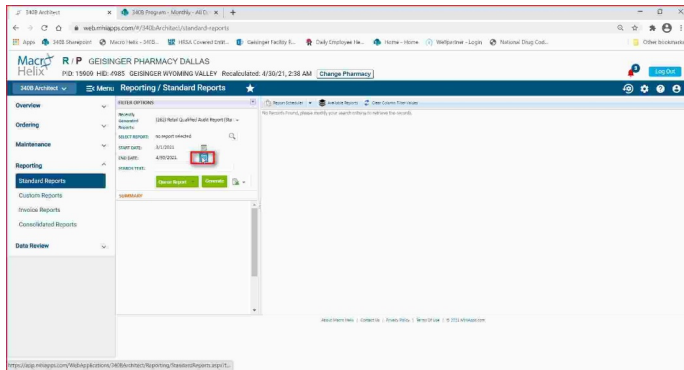
25. Bot will pick click on arrows to go back to the previous month if needed



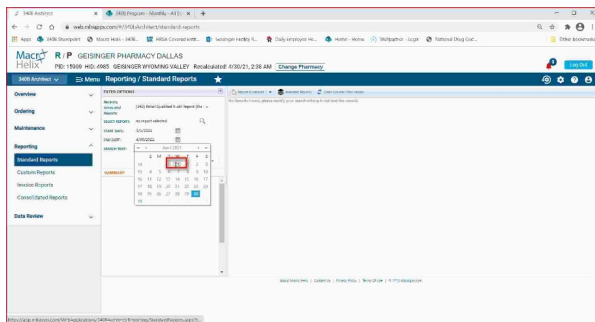
26. Bot will click on the first date on the previous month



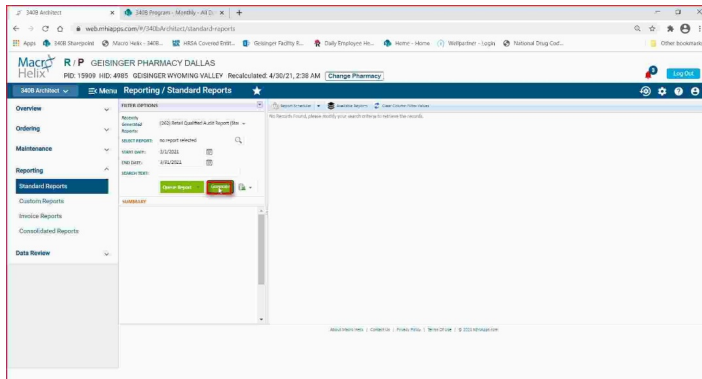
27. Bot will click on the calendar to pick the End date (last date of the previous month)



28. Bot will click on the last day of the previous month for the End Date



29. Bot will click Generate and wait until the Disappears and report is ready



30. If the report is blank or not downloaded (no data), Bot will alert the business in the beginning of the run (on the 5th) that those PID's did not have any data

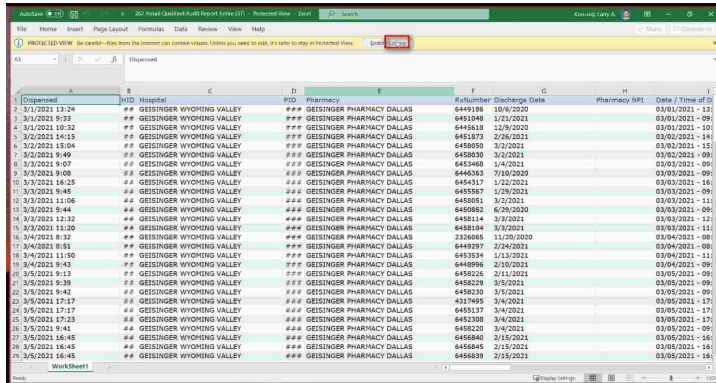
31. Bot will click on the down arrow next to the icon highlighted

32. Bot will click on Entire Report Excel – 2007

33. Bot will find the downloaded document from the bottom of the screen and click on the up arrow.

34. Bot will click open

35. Bot will click Enable Editing



36. Bot will add 4 new columns:

- Qualified Encounter
- Status
- Report Color
- Complete time

BA	BB	BC	BD
QualifiedEncounter	Status	ReportColor	CompleteTime
TIME		Value	12/20/20

37. Bot will highlight and copy the first MRN and will go to Epic to find the medicine listed in the N column (NDC Description)

38. Bot will click on review

39. Bot will type the MRN and click Find Patient

40. Bot will click Select from the patient look up window after verifying the DOB. (Column AT from spreadsheet)
41. If bot cannot verify/find the patient in Epic, Bot will click cancel and move on to the next patient
- a. Bot will put in the Status column: Cannot find the patient in Epic – and move it to blue tab
42. If Bot lands on Break the Glass pop up, it will click Cancel, and move on to the next patient
- a. Bot will put in the Status column: Break the Glass patient – and move it to blue tab
43. If Bot lands on Patient Chart Advisories, Bot will click on Chart Review
44. Bot will use Lexicomp link to find key words on searching the medication if BOT cannot find the medication:
- Link: [Lexicomp](#)
45. Bot will type the medication name and click search

Lexicomp



46. Bot will click on the link under the Lexi-Drugs

Lexi-Drugs

[Furosemide](#) [Dosing](#) | [Administration](#) | [Adverse Reactions](#) Updated 07/03/21

47. Medication's brand and generic name will be under highlighted areas (keywords to search)

Warfarin (Lexi-Drugs)

Outline [Expand All](#)

[ALERT: US Boxed Warning](#)

[Pronunciation](#)

▼ [Brand Names](#)

Brand Names: US

Brand Names: Canada

[Pharmacologic Category](#)

> [Dosages](#)

> [Uses](#)

[Clinical Practice Guidelines](#)

> [Administration and Storage Issues](#)

Monograph

[Images](#)

[Adult Patient Education](#)

ALERT: US Boxed Warning

► [Bleeding risk:](#)

Pronunciation



(WAR far in)

Brand Names: US

Coumadin [DSC]; Jantoven

Brand Names: Canada

APO-Warfarin; Coumadin [DSC]; TARO-Warfarin

48. All the Medicine Names found in Lexicomp will be used in Med search in med list and med search in documentation in Epic

49. Bot will click on MEDS tab

Note: This process design document includes a loopback feature at Step 50. If the outcome is **Red** between steps 50 – 100, and we have more than one (1) possible medication ordered by date/med name, the loopback allows for the reiteration of Steps 50 → 100 until the outcome is not Red or all options have been evaluated.

50. Bot will uncheck the Current Meds Only

51. BOT will search the Medication with NDC Description (medication NAME without strength or dose only) and written date

Columns: N, AD

52. Bot will only look at all AMB medications. (Current or past meds)
53. Bot will look at the medication name and written date
- a. Medication name is listed under medication column or in the preview window
54. If Bot cant find the medication by name, BOT will highlight the row in blue and put it Status column: Script not found in Epic (Insert: Medication Name).
55. Bot will check if the written date (column AD) is the same in Epic
56. Bot will verify the date/time signed: Date only (no time needed) matches the spreadsheet.
57. If Bot cant find same written date but it is in 7 days of the Macrohelix's written date, BOT will put this transaction in blue tab, and put it Status column: Script not found in Epic (insert: From Written Date from Epic).
58. Bot will check the strength of the medication (dosage in MG, MG Tablet, Capsule, MCG, MCG/S etc) (In this example it is 5 MG)
59. Bot will confirm that the same medicine in Epic has the same strength

List for BOT to check to determine which script to choose (when written date and drug name and strength match)

1. Narrow it down to picking one script
 1. AMB script
 2. Matching provider (provider from Macrohelix matches Epic provider)
 3. Matching quantity (quantity from Macrohelix matches epic quantity)
2. If bot cannot narrow it down to picking one script only
 1. if multiple scripts match the drug, and match the written date, and match the provider and quantity, choose first script (last signed time)
 2. if multiple scripts match the drug, and match the written date, and If none of the scripts match provider or quantity, choose first script (last signed time)

60. If any discrepancy with Strength, Bot will note in the Status Column and mark the row **YELLOW**.
(bot will still continue processing the scripts by following the below steps) Insert Verbiage: Strength
Discrepancy "Epic strength is ___ and Macrohelix is ___"



61. Bot will check the Quantity of the same medicine (column Z)
62. Bot will look into DISP field in Epic to confirm the dispense is the same number. (In this example
Epic Dispense is 180, Pharm Is 60)
63. Bot will highlight the row in orange when dispense discrepancy.
64. If there is a quantity discrepancy, Bot will divide the dispense by any units (strength available) and
compare the result with the Macrohelix dispense. If there is a match, no dispense discrepancy will
be reported.
65. Bot will document the discrepancy in status column section and keep it in YELLOW: Dispense
Discrepancy "epic dispense ___ and Macrohelix is ___" (continue processing the transaction)
66. Bot will look at the prescriber name (column P) in Macrohelix report
67. Bot will look at the Authorizing provider name in Epic.
68. If the microhelix provider name did not match Epic provider name, Bot will comment: Authorizing
provider "Macrohelix Name" did not match Epic provider "Epic provider name". Color will be
"YELLOW", and continue processing
69. Bot will move on to checking provider name from Epic to spreadsheets.
70. Bot will use different spreadsheets if needed
71. Bot first go to the Pharmacies to Audit spreadsheet under Bot Audit Resources folder in
<https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B?e=1%3A50a55d1bb0c4901a4b386341362acd5> link

72. Bot will look at the PID number from Macrohelix (column A), to determine which hospital grouper location Roster it should open by looking at column D

	A	B	C	D	E
14	20274	Accredo Health Group (New Castle) Geisinger Medical Center	retail	GMC	
15	20276	Accredo Health Group (Orlando) Geisinger Medical Center	retail	GMC	
16	20273	Accredo Health Group (Tempe) Geisinger Medical Center	retail	GMC	
17	20272	Accredo Health Group (Warrendale) Geisinger Medical Center	retail	GMC	
18	12276	Danville Pharmacy	retail	GMC	
19	12321	Geisinger DBA: Bush Outpatient Pharmacy	retail	GMC	
20	15617	Geisinger Mail Order Pharmacy (GMC)	retail	GMC	
21	16754	Geisinger Pharmacy Woodbine	retail	GMC	
22	11878	Geisinger Specialty Pharmacy (GMC)	retail	GMC	

73. Bot will open the Bot resources folder in 340B Site:

<https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B/SitePages/Home.aspx?e=1:50a55d1bbb0c4901a4b386341362acd5>

74. Bot will click on the appropriate facility list to open (credentialed providers)

- GCMC = Geisinger Community Medical Center
- GJSH = Geisinger Jersey Shore Hospital
- GMC = Geisinger Medical Center
- GWV = Geisinger Wyoming valley
- GLH = Geisinger Lewistown Hospital

	BOT Combined Resident and Fellow List.xlsx
	BOT terminated prescribers.xlsx
	GCMC Credentialed Providers 3.1.22.xlsx
	GCMC_DEP_Records 2021-11.xlsx
	Geisinger Clinic Providers 3.1.22.xlsx
	GJSH Credentialed Providers 3.1.22.xlsx
	GJSH_DEP_Records 2021-11.xlsx
	GLH Credentialed Providers 3.1.22.xlsx
	GLH_DEP_Records 2021-11.xlsx
	GMC Credentialed Providers 3.1.22.xlsx
	GMC_DEP_Records 2021-11.xlsx
	GWV Credentialed Providers 3.1.22.xlsx
	GWV_DEP_Records 2021-11.xlsx
	Pharmacies to Audit 2.24.22.xlsx

 HRS

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75. Bot will search the authorizing provider name using the NPI from EPIC authorizing provider in this spreadsheet.

- a. (Search first by NPI, if no NPI match, then by: Last name, first name, middle initial)
- b. NPI - via API (obtained via Epic API)
- c. Last Name, First name, and middle name (Columns B, C, D)
- d. NPI (column Q)

76. If the provider is found. Bot will not search additional spreadsheets

77. Bot will open the BOT Combined Residents and Fellows List from > Bot Audit Resources.

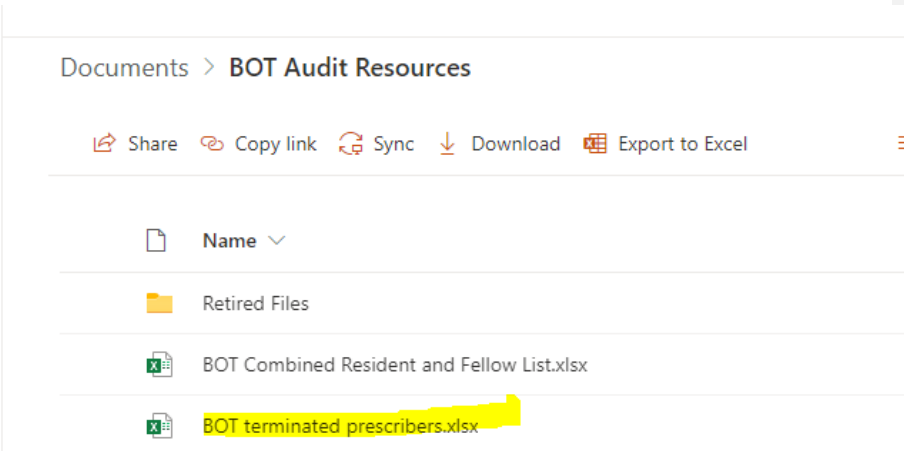
<https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B/SitePages/Home.aspx?e=1%3A50a55d1bb0c4901a4b386341362acd5>

 BOT Combined Resident and Fellow List.xlsx

78. Bot will search the authorizing provider name using the NPI from EPIC authorizing provider in this spreadsheet.

- a. (Search first by NPI, if no NPI match, then by: Last name, first name, middle initial)
- b. NPI - via API (obtained via Epic API)
- c. Column A - Last name
- d. Column B – First name
- e. Column C – Middle Name initial
- f. Column D - NPI

79. Bot will go to the BOT terminated prescriber document in spreadsheet



- a. <https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B/SitePages/Home.aspx?e=1%3A50a55d1bbb0c4901a4b386341362acd5>
- b. (Search first by NPI, if no NPI match, then by: Last name, first name, middle initial)
- c. NPI - via API (obtained via Epic API)
- d. Column A - Last name
- e. Column B – First name
- f. Column C – NPI

If Bot cannot find the provider in any the spreadsheets, Bot will type in the Notes 'ineligible provider (provider name)' and mark the row in: RED

80. A provider could be seen in more than one spreadsheet.
81. If no NPI available, and BOT finds more than 1 provider any of the lists, mark the ROW in BLUE and put in NOTES: Multiple providers found on lists
82. Bot will look at the spreadsheet Qualified location (column AI) for this medication to see if it is Blank
83. If the column AI blank, Bot will go to the order transmittal link
84. Bot will use the department number instead of Qualified location name

Encounter type:	Office visit [101]
Department:	NEUROLOGY D1 DANVILLE [6112]
Order Workstation:	D3 NEURO 700003 030100711

85. If the Qualified location was blank, Bot will find the qualified location name from Epic Order transmittal, copy it and paste it in column AI: "Epic: "Paste Department name and number from Epic".
86. Bot will copy the department ID and name from Order transmittal (Bot will not use the qualified location from macrohelix, it will use the order transmittal information in Epic)
87. Bot first go to the Pharmacies to Audit spreadsheet under Bot Audit Resources folder in <https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B/SitePages/Home.aspx?e=1%3A50a55d1bbb0c4901a4b386341362acd5> link
88. Bot will look at this spreadsheet to determine which hospital grouper location Roster it should open
 - a. PID column A = match the PID
 - b. Grouper location = column D

Excel Pharmacies to Audit 5.13.21 ^{RA} - View-only

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Calibri B [Font Icons] [Color Picker] [Text Background Color] [General]

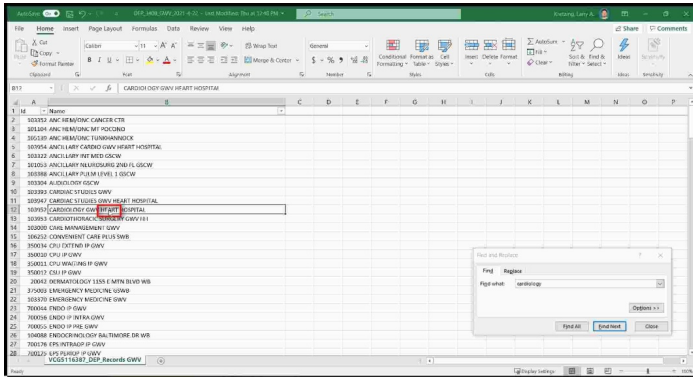
	A	B	C	D	E
10	20274	Accredo Health Group (new Castle) Geisinger Medical Center	retail	GMC	
11	20276	Accredo Health Group (Orlando) Geisinger Medical Center	retail	GMC	
12	20273	Accredo Health Group (Tempe) Geisinger Medical Center	retail	GMC	
13	20272	Accredo Health Group (Warrendale) Geisinger Medical Center	retail	GMC	
14	12276	Danville Pharmacy			
15	12321	Geisinger DBA: Bush Outpatient Pharmacy	retail	GMC	
16	15617	Geisinger Mail Order Pharmacy (GMC)	retail	GMC	
17	16754	Geisinger Pharmacy Woodbine	retail	GMC	
18	14479	Geisinger Specialty Pharmacy (GMC)	retail	GMC	

89. Bot will open the hospital grouper list for this hospital location

(Link: <https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B>) > Go to Bot Audit
Resources > (GCMC, or GJSH, or GLH, or GMC, or GWV) _DEP_ Records

[illegible]

90. Bot will search and find the department name or ID (from order transmittal) in this spreadsheet



91. If Bot can not find the department in that spreadsheet, Bot will type 'ineligible dept (department name from Epic).

92. Bot will highlight the row and pick the red color since the department was ineligible

93. Bot will scroll down from med preview window in Epic to find View Encounter and click. This medicine must be prescribed from an eligible encounter:

- a. patient must have been seen under this department within 547 days from written date
- OR
- b. by this provider under an eligible encounter department within 547 days from written date
 - i. Bot will use the same grouper spreadsheet as the encounter department grouper list (steps 90 to 93) to verify the eligible encounter department is in the hospital grouper list.

Commented [MD1]: Change to workflow - changing from "within 365 days from dispense date" to "within 547 days from written date"

94. Bot will look at the encounter type

Acceptable encounter types:

- Anything in person or telemedicine: Telemedicine, Televideo, Telephonic (not telephone), Office Visit, Admission, Inpatient, ED to Hospital Admission, ED (Discharge).

95. If the visit type is one of the acceptable types, Bot will not search for additional encounter

96. If acceptable encounter,

- a. Bot will put in Qualified Encounter column: True, Bot found qualified encounter and found documentation (Insert: Date/Department/Provider of qualified encounter) – and Keep it in Yellow tab

Locations for Bot to look at in the qualified encounter:

The hospital admission (discharged) and ED-Hosp Adm (Discharged) encounters contain the “Discharge Summary” on the encounter. Bot can search the discharge summary documentation for free text

ED encounters will contain “ED Provider Notes”. Bot will search Ed Provider notes for free text

Other note type is Encounter Notes and H&P notes in hospital encounters:

And clicking on “All Notes” can open up other type of notes

97. If the visit type is not one of the acceptable visit types, BOT will go under Encounters tab to look for more past visits

98. Bot will click on Encounters tab (if the medication prescribed encounter is not one of the inclusion visit types

99. Bot will search and find a past encounter: Telemedicine, Televideo, Telephonic (not telephone), Office Visit, Admission, Inpatient, ED to Hospital Admission, ED (Discharge). with the same Department (must) and/or Provider (optional) .Or. Same provider under an eligible encounter department. Search by department first then provider. (within 365 days)

100. Bot will double Click

101. Bot will confirm that the visit type, the (same Department (must) and/or Provider (optional) .Or. Same provider under an eligible encounter department.)are in the inclusion list.

102. When Bot finds qualified encounter and qualified documentation, Bot will put in Qualified Encounter column: Bot found qualified encounter and found documentation (Insert: Date/Department/Provider of qualified encounter) – and Keep it in Yellow tab

103. Bot will busy search qualified encounters (may have to look at several encounters) to find the medication name as free text in the note

Accepted format:

Accepted Format:

Unaccepted format:

104. Unacceptable format smartlinks are attached at the end of the PDD.

105. When Bot finds qualified encounter and NO qualified documentation, Bot will put in Qualified Encounter column: Bot found qualified encounter and found NO documentation (Insert: Date/Department/Provider of qualified encounter) - and move it ORANGE to tab

106. If Bot cannot find any free text documentation and cannot find a qualified encounter, Bot will put in Qualified Encounter column: False. Bot couldn't find qualified encounter - and move it to orange tab

107. Bot will complete each spreadsheet for listed pharmacies separately for each PID

- a. File name will be the audit month – not the automation run month (example : march 2023 run audits February 2023 audits)
- b. BOT will create folders for each month, and then for hospital and retail (example: March 2023 > Hospital > each PID uploaded separately, March 2023 > Retail> each PID uploaded separately)

108. Bot will save completed audit forms and send them to Bot Audits Folder:

<https://geisinger.sharepoint.com/:f:/r/sites/PharmacyOperationsCompliance/340B/Shared%20Documents/BOT%20Audits?csf=1&web=1&e=dgHhyz> – MM YYYY PID Pharmacy Name

109. Bot will provide a process report as soon as each PID is completed separately for each pharmacy and hospital location. Using the template:

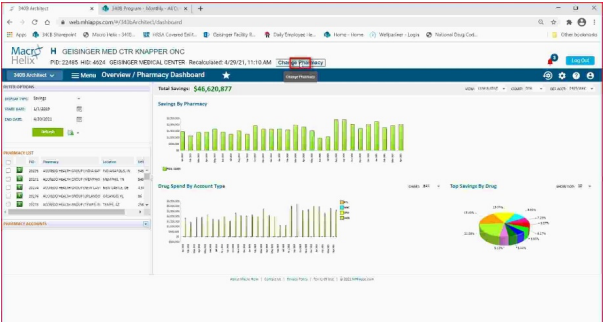
https://geisinger.sharepoint.com/:x:/r/sites/PharmacyOperationsCompliance/340B/_layouts/15/Doc.aspx?sourcedoc=%7B8ABF1120-2FDF-484B-A5DA-95F17A2E51BF%7D&file=Audit%20Summary%20Spreadsheet%20Template.xlsx&wdLOR=c9050E2AF-7B1A-4597-B2AC-185247FF9A57&action=default&mobileredirect=true and will save it with MM YYYY Audit Summary

Spreadsheet _PID Number name.

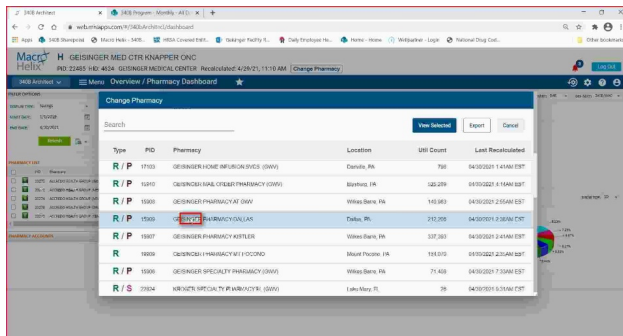
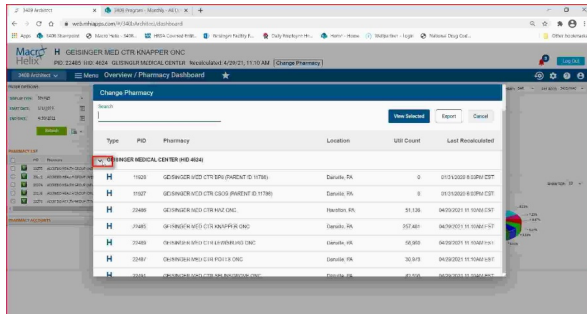
Column C and E will be the total numbers
Script Reversed = anything that highlighted Red = Column F
Ineligible Locations = Column G
No Office Visit = Column H
No Script in Epic = Column I

	A	B	C	D	E	F	G	H	I
	PID	Pharmacy	Total Scripts	First Fills	Scripts Audited	Scripts Reversed	Ineligible location	No office visit	No script in Epic/ Other
1	12276	Danville Pharmacy							
2	11979	Geisinger Specialty (GMC)							
3	15617	Geisinger Mail Order (GMC)							
4	16754	Geisinger Pharmacy Woodbine							
5	12321	Bush Retail							

110. In order to go to the next pharmacy BOT will Bot will click to Change Pharmacy for the next pharmacy in line



111. Bot will find the pharmacy with the PID number from the audit spreadsheet



4.5 EXCEPTIONS IN THE PROCESS FLOW

Exception	Actions	Comment
Break the glass popup	Report in the output file	
Cannot find the patient	Report in the output file	

4.6 SYSTEM ERRORS

Error	Action	Comment
Application crash	Recover and retry 3 times	
Transaction Fail	Recover and retry the same transaction 3 times	

4.7 PROCESS CONTINUITY

Prevention: Establishing and defining what redundancies and protocols are in place to prevent failures in the process and maintain business continuity		
Event	Actions (Who/what/How)	Result
When the system or application is down (i.e. EPIC, SP, MacroHelix, Edge)	- Alert set up for IAH team - IAH plan accordingly - Bot will wait one day before restarting the monthly process	Bot runs monthly, if any application has downtime, bot will wait till the next day to go back to finish processing
When the document in SP links are missing	- Alert set up for IAH team - IAH plan accordingly - Bot will wait one day before restarting the monthly process	Bot runs monthly, if any application has downtime, bot will wait till the next day to go back to finish processing
SP links naming, columns are not in expected format	- Alert set up for IAH team - IAH plan accordingly - Bot will wait one day before restarting the monthly process	Bot runs monthly, if any application has downtime, bot will wait till the next day to go back to finish processing
Detection: Defining what protocols are in place for monitoring the process to detect bugs and stop incorrect actions at all points post go-live and escalated monitoring during massive systems changes		
Event	Actions (Who/what/How)	Result

Quality Assurance	- Audit/Manual review by business and B.A. (10 records daily) - Alert system	If mistakes reported, Bot will correct the actions and changes will be implemented before the next run.
Hypercare	- Alert system (10 records daily) - Logs reviewed by BA and Developer	
Recovery Assessing the level of risk, define strategic stakeholders to be alerted in need of a recovery and outlining the recovery plan to get back to operational state.		
Event	Actions (Who/what/How)	Result
If the bot fails, how will it continue and resolve issue?		If bot is unable to complete the automated process, it should email the user to provide an update as well as email alert to the Bot Controller. The Bot Controller will then be responsible to triage the bot disruption, fix the issue(s), and either schedule ad hoc processing or resume the bot processing.
What happens once automated process finishes?		The bot will send an email to the user specified in the process flow.

5. Technical Details

Item	Description	Comment
Robot Type	Unattended	

Orchestrator used?	Yes/No	Cloud or On-Premise/Version
UiPath version used	2019.10	

6. Reporting

Report Type	Update Frequency	Details	Distribution List
Process Report	per PID as they are pulled with summaries	Report of status of processed transactions	emailed
Audited Reports	Monthly per PID as each PID is completed	Reports of all audited reports	Upload to SP

7. Environment Details

Application	Development Stage	Environment	Access Type	Access Key/Credential
Epic	Development	<Epic_Dev>	IAHPHAR M IAHPHAR M2	Username: <username> Password: <password>
	Test	<Epic_Test>	IAHPHAR M IAHPHAR M2	Username: <username> Password: <password>
	PROD	<Epic_Prod>	IAHPHAR M	Username: <username>

			IAHPHAR M2	Password: <password>
Outlook	Development /Test/UAT/Prod	<Environment Name>	Email account and password	Email: Password: <password1>
Sharepoint		Facility Roster with Privilege link: Pharmacy groupers list Provider Lists Medical Staff Roster/ Geisinger Clinic : Combined Resident and fellow list Terminated Resident List: https://geisinger.sharepoint.com/sites/PharmacyOperationsCompliance/340B/SitePages/Home.aspx?e=1%3A50a55d1bbb0c4901a4b386341362acd5	Access will be required.	
MacroHelix		https://www.mhiapps.com/	Access will be required	
Lexicomp		http://online.lexi.com/lco/action/home?siteid=7981	Access will be required	

8. Assumptions

Assumption	Impact
Macrohelix website is online and reports are exportable	If Macrohelix is down, Reports cannot be exported
Sharepoint Links down to check provider names	If any of the SP links are down, that part of the workflow cannot be completed
Lexicomp is down	If Lexicomp is down, Bot cannot complete that part of the workflow
All SP Links will be updated before 5th of each month before BOT starts running monthly	If documents are not updated, Bot will run the audits with the existing files.

9. ADDITIONAL SOURCES OF PROCESS DOCUMENTATION

Type	Name	Link	Comments
Video recording	IAH – Deep Dive 1	TBD	Insert any relevant comments
Work instructions	User process manual	TBD	Insert any relevant comments

10. Appendix

10.1 GLOSSARY

Acronym/Term	Meaning
PDD	Process Design Document – document that contains information about the process in scope for automation and about the agreed technical solution
RPA	Robotic Process Automation

11. Email Alerts

If the report is blank or not downloaded (no data), Bot will alert the business in the beginning of the run (on the 5th or 15th) that those PID's did not have any data

- Recipients:
- Body: PID *** do not contain any transaction from MM/YYYY Run

When the monthly process is done, BOT will send an email to business letting them know run is complete and file is uploaded to SP.

- Recipients:
- Body: The automation run for MM/YYYY Run completed and document uploaded to 340B Site.