

Geisinger Intelligent Automation Hub (IAH)

Process Design Document / Solution Design Document

Process Name: Aged Orders Sleep / ENT

Purpose of Document

This document serves as the technology policies and procedure (AKA runbook) for Intelligent Automation Hub at Geisinger

Intended Audience

This document is intended to be referenced by Geisinger Intelligent Automation Hub's stakeholders and wider project team members as well as the relevant Operational Support groups

DOCUMENT CONTROL

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REFERENCE DOCUMENTS (please ensure all have permissions to access link)

Document Name	Description	Link
Not applicable	Not applicable	Not applicable

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1. Document Details

1.1 Purpose Of This Document

This document intends to provide a detailed process and solution design proposal for robotics automation of the Aged Order Sleep / ENT process.

2. General Process Description

2.1 Process Summary

Aged Order Sleep / ENT processing occurs on a periodically to remove all orders or appointments that have existed within specific workques in excess of a 13 months. Once an order has exceeded this time frame, a report from EPIC containing these orders is generated and sent to the IT department via CSV file. When IT receives the CSV file, a manual batch is run to migrate orders from the “active” tab to the “canceled” tab in EPIC. Automation will eliminate the manual process of transferring orders within a specified timeframe from the “active” tab to the “canceled” tab in EPIC and enable the process to be done on a daily, rather than monthly basis.

2.2 Data Flow & Applications

Input

Input	Format	Location	Frequency	Comment
N/A	N/A	N/A	N/A	N/A

Output

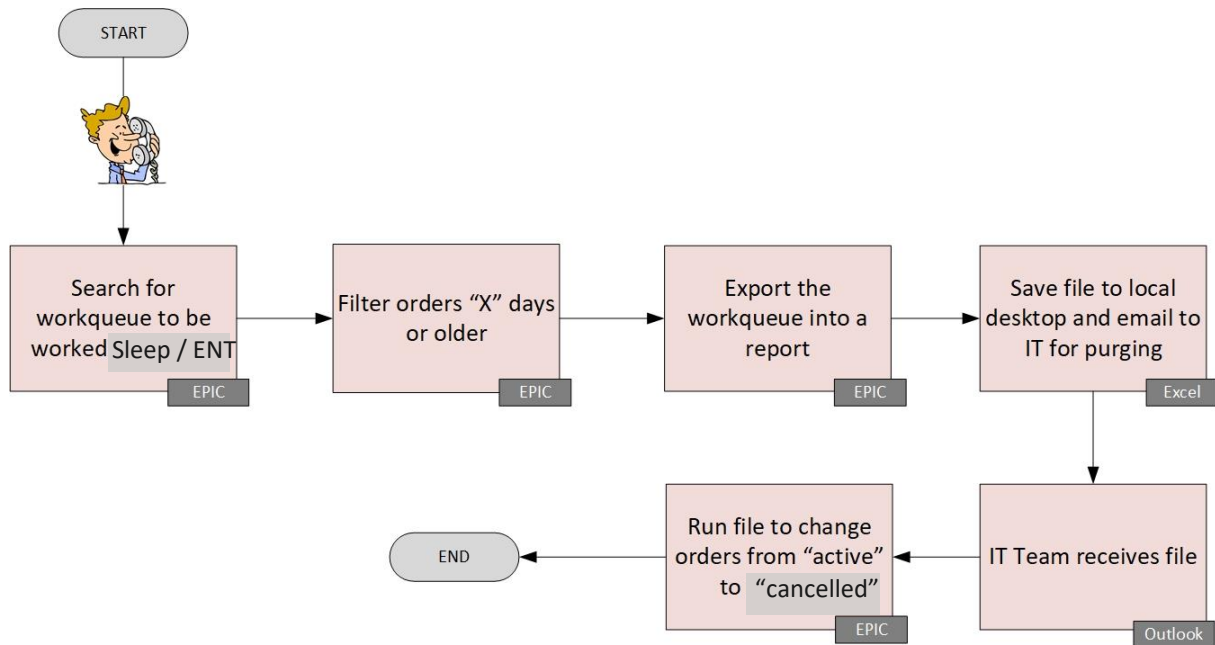
Output	Format	Location	Frequency	Comment
Report File	Excel	Network Drive	Daily	

2.2.1 Systems

Application	Interface	Req Key / Operation / URL	Comment
EPIC	Desktop Application	Not applicable	

2.3 Process Flow

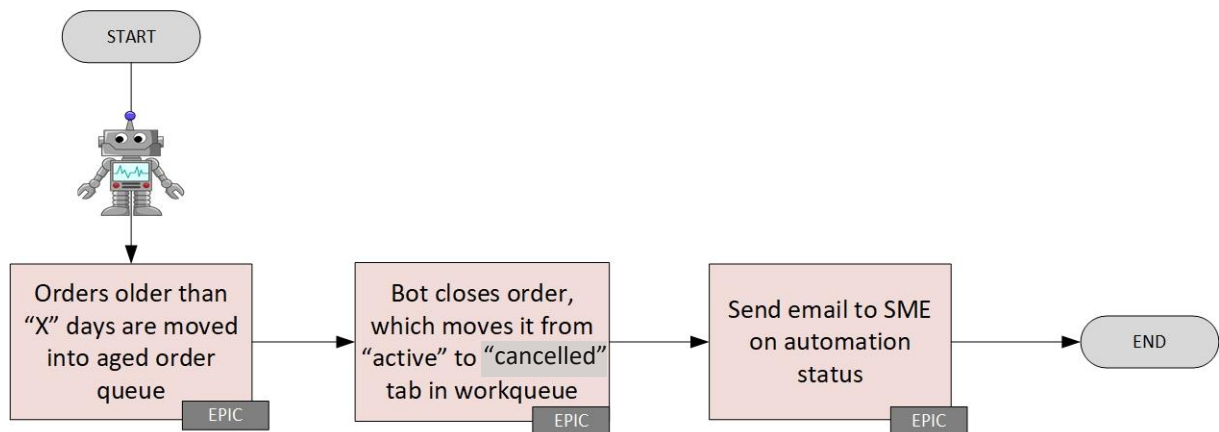
High Level Process Flow (As-Is)



Detailed "As-Is" Process Steps

1. Log into EPIC and search for the specific workqueue that needs to be worked
2. Click the "filter" button. Use the calendar to select the date that is 13 months prior to current date. This will filter the workqueue to show orders within specified timeframe
3. Once the filtered workqueue loads, click the "export" button to export the workqueue into an Excel and save it to the desktop.
4. The file is attached to an email message and sent to IT department
5. IT team receives the file, and runs a snow query. This will move the orders from the "active" tab to the "removed" tab of the workqueue

Bot Automation Process & Workflow (To- Be)



Detailed "To-Be" Process Steps

1. Based on rules built into workqueue, orders within targeted workqueues that are within a timeframe set by business will show on the Aged Order workqueue
2. Bot closes each order with the removal reason "Removed by Resulted Batch"
3. Order moves from "active" to "cancelled" tab of workqueue due to cancel
4. Bot sends a report to SME on status of automation

2.4 Business Rules

Rule	Rationale
Automation will run daily	To ensure queue is up to date and not overcrowded
Removal reason will be "Removed by Resulted Batch"	Bot must select reason to close order

2.5 CURRENT STATE METRICS

Avg. Monthly Transactions	# Batches Monthly	Avg. Volume / Batch	Weekly Avg. Volume	Frequency
1	1	3,300	1000	Monthly

3. Step-By-Step Process Documentation

3.1 Happy Path Of Automation

1. Select Epic Hyperspace icon (specified in TDD section 5.1)
2. Enters log-in credentials at login screen once Epic is open (user name & password) and click "Log in" button
3. Epic will direct user to department screen (currently defaults to: RESULTS REVIEW[200032] . Bot clicks "Continue"
4. Epic will open to message of the day screen. Bot clicks "OK"
5. Once Epic opens to "In-basket" home screen, select " Epic " drop-down in upper left-hand corner of screen
6. From drop down list, select "Schedule Orders"> "Workque List"
7. From the Workqueue list, user will scroll to the workqueue 9703 Aged Orders and scroll to workques titled 4724 Speech Path., 4318 ENT, 4470 Audiology and 4110 Sleep. Based on rules built into Aged Order workqueue, orders that have existed within a defined timeframe set, greater than 13 months, will populate this queue.
8. **To export normal WQ List:** Select Column Actions > Export > Export to CSV File> Yes.
9. Bot is prompted to download and save WQ list to the appropriate location.
10. **Save file using naming convention; "Workqueue Name mm dd yy"**
11. **Set password as in both fields in the resulting pop-up, and then click the "Accept" button**
12. **Exporting Large WQ List:** Column Actions > Export > Export to CSV File> . Pop up window will appear. Click Yes.
 13. WQ List will load, once complete, Epic will allow the bot to download and save the list
 14. Bot saves WQ list to the appropriate location
 - 12.5 Bot repeats process above for remaining work queues beginning at step 7.
15. **To filter by specific Order in WQ list:** Select the respective WQ List.

16. Once WQ list opens, select the “filter button” to open filter edit screen.
17. Select the “Add” button to access filter property screen.
18. Select the “Order ID” filter from the property rule list to add it to the filter edit screen.
19. Scroll down to “value” field and enter in corresponding order ID number of order.
20. Select “Add” button and then “Accept” to apply filter.
21. Select “Accept” at the bottom of the “Filter Edit” window to show specific order.
22. Left click order and click “Cancel Request” button, (removal reason pop up will appear). Click search window and type “Removed by Resulted Batch”
23. Select matching Title, “Removed by Resulted Batch” from pop-up screen Title Widow below.
24. Select “Cancel Requests” on pop-up screen
25. Once order is removed via resulted batch, it will migrate from the “active” to the “cancelled” tab of the workqueue resulting in order closure.

3.2 Exceptions In The Process Flow

Exception	Trigger	Actions	Comment
Epic is not responding	Epic crashes or access is not possible. Page does not load in the given delay	Bot should try 3 times. Second time after 1 minute and third time after 5 minutes.	N/A

3.3 System Errors

Error	Trigger	Actions	Comment
N/A	Not applicable	Not applicable	

3.4 Pop-Ups

Pop-Up	Trigger	Actions	Comment
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Remove Order	This pops up closing order	Select removal reason, then "remove order"	

3.5 Process Continuity

Event	Result
If the bot fails, how will it continue and resolve issue?	If the bot fails for a specific order, mark with notes then continue to next order. If bot fails for automation completely, it should email the user to provide an update as well as email alert to the Bot Controller [iah_rpa_prod_support@geisinger.edu]. 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 with a link to the Excel file from the output. Emails to XXX Uploads file to SharePoint site . Documents> IAH> Aged Order> Output.

3.6 System Characteristics

Not applicable

4. Additional Process Considerations

4.1 Word Or Xls Templates

Input File: Not applicable

Output File: Excel with automation status

Order input bot should pull and include in Excel:

- Order ID #
- Patient MRN
- Procedure
- Ordering Date
- Priority
- Automation Status
- Remarks

4.2 Vb(A) Or Other Scripts Used In The Flow

Not Applicable

4.3 E-Mail Templates

Email for bot to send once complete:

Subject: Aged Order – Auto Removal Status

Body: Attached is the report of the automation ran on *insert date of run*

Attachment: Aged_Order_Auto_Removal_Status.xls

Email Distribution:

4.4 Process Standardization

Not applicable

4.5 Queries

Not applicable

4.6 Other Automated Tasks Related To The Process Or To The Applications In The Process

Not applicable

4.7 Access

Bot user ID credentials for EPIC will need to be provisioned with the appropriate permissions

Access	Username/Password	Comment
In Development/QA	IAH CAD	
In Production		

5. Assumptions And Risks

5.1 Assumptions

Assumption	Rationale
The entire process is automated end to end with no manual intervention	
Availability of EPIC system is assumed without any disruptions	

5.2 Dependencies

Dependency	Impact	Owner	Status
Aged Order work queue creation	Process efficiency		Complete
Sample data	Testing efficiency		Complete
Bot access in dev/prod	Development		Pending

5.3 Outstanding Issues

Issue	Date Raised	Owner	Status	Date Closed	Comments

5.4 Known Risks

Risk	Impact	Date Raised	Owner	Status	Date Closed	Comments

6. Appendix

6.1 Glossary

Acronym/Term	Meaning

6.2 Other Interesting And Existing Documentation

Not applicable