

Deaconess

Medical Necessity Review - Vitalware

Process Definition Document

Purpose: The Process Definition Document (PDD) formalizes the final design of an automation solution. It functions as an approval artifact for automation and operations teams, enabling the transition from design to development once approved.

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I. AUTOMATION OVERVIEW

1.1 Objectives

The automation will achieve

- An automated medical necessity local coverage determination (LCD) from Vitalware for several work queues and posting results into Epic
 - Referral:
 - 5876- RFL CO PSYCHOLOGY- benefits and auth
 - 5935- RFL CO 1- benefits and auth
 - 5936- RFL CO 2- benefits and auth
 - 5937- RFL CO 3- benefits and auth
 - 5938- RFL CO 4- benefits and auth
 - 8043- RFL WEIGHT LOSS- benefits and auth
 - 28563-RFL CO SURG CHILD WQ 1- auth
 - 28564- RFL CO SURG CHILD WQ 2- auth
 - 29775- RFL CO 5- benefits and auth
 - 30286- RFL CO SURG CHILD WQ 3- auth
 - 30380- RFL CO LAB REFERRALS- auth
 - 30617- RFL CO SURG CHILD WQ 4- auth
 - 33869- RFL CO 6- benefits and auth
 - 34170- RFL CO MAD HVC CARD/VASC PROC- auth
 - 34284- RFL CO DIL EXTERNAL RADIOLOGY- auth
 - 34304- RFL CO MAD LAB REFERRALS- auth
 - 35942- DHS REFERRALS TO OA- auth
 - 36023- RFL CO ALLERGY- benefits and auth
 - 36793- RFL CO WOUND CARE- auth
 - 37146 – JSH PENDING AUTHORIZATION PARENT
 - 37844- RFL CO DIL LAB REFERRALS- auth
 - 38180- RFL CO DIL SURG CHILD- auth
 - 38193- RFL CO DIL CHILD 1- benefits and auth
 - 38194- RFL CO DIL CHILD 2- benefits and auth
 - 38198- RFL CO CARDIOLOGY- auth
 - 38391- RFL CO DIETARY/DIABETES- benefits and auth
 - 38447- RFL CO ORTHO- auth
 - 38557- MAD POW RFL CO IMAGING- auth
 - 38843 – RFL CO JSH LAB REFERRALS
 - Patient:
 - 3166- DC DT PROCEDURE CTR PRE-REG (INCLUDING MC/GW GI)- pre-reg and authorizations
 - 30076- HND/UCH/GIB AUTH/CERT PREADMISSIONS- pre-reg and authorizations
 - Deaconess Service Area 30:
 - 1776 - MC/GW Sleep/COPD/Respiratory Pre-Reg - Pre-Reg and Authorizations
 - 16024 - Authorize Sleep Procedure - Pre-Reg and Authorizations

- 3154 - MC/GW Pain Management Pre-Reg Missing Items - Pre-Reg only
- 5914 - DHS Outpatient Infusions - Pre-Reg Only
- 38430- DHS RAD/PROC RHYME Use - Pre-Reg and Authorizations
- 36028 - New Card Non-Invasive Pre-Reg - Pre-Reg and Authorizations
- 37746 - DHS Medicare/Ultrasounds Prior Auth WQ - Pre-Reg and Authorizations
- Baptist Service Area:
 - 33553 - BHD MAD RAD/CARD PRE-REG MISSING ITEMS - Pre-Reg and Authorizations
 - 33580 - BHD MAD OP INFUSION PRE-REG MISSING ITEMS - Pre-Reg only
 - 34088 – BHD MAD PET PRE REG Missing Items
- DIL Service Area:
 - 35793 - DIL RAD/CARD PRE-REG MISSING ITEMS - Pre-Reg and Authorizations
 - 35794 - DIL SLEEP/COPD/RESPIRATORY PRE-REG - Pre-Reg and Authorizations
 - 35795 - DIL AUTHORIZE SLEEP PROCEDURE - Pre-reg and Authorizations
 - 35796 - DIL OUTPATIENT INFUSIONS - Pre-Reg Only
 - 36028 - NEW CARD NON-INVASIVE PRE-REG
 - 37623 – JSH Authorize Sleep Procedure
 - 37624 – JSH Outpatient Infusions Pre Reg
 - 37625 – JSH Card Non Invasive Pre Auth
 - 37846 – JSH RAD/CARD/PROC Rhyme Use

1.2 Operational metrics

The automation will impact the following operational metrics

- Local Coverage Determination (LCD) Results
 - Pass
 - Additional criteria
 - Fail
- Days out to appointment date
 - Goal is to increase standard of completing Medical Necessity Review to 10 days prior to appointment (currently at 2 days)
- [additional metrics to be determined]

1.3 Design Team

The following individuals contributed to the automation design, must be informed of changes, and agree to support the maintenance of this automation

Name	Role / Title	Contact
Connie Conger	Operational Owner	Connie.Conger@hcrsolutions.com
Austin Harden Amy Dimmett	Operational SME(s)	Austin.Harden@hcrsolutions.com Amy.Dimmett@hcrsolutions.com
Michael Bordador	Solution Architect	Michael.Bordador@tarponhealth.com

Matt Cheney Manmohit Luthra	Developer	Matt.Cheney@tarponhealth.com Manmohit.Luthra@tarponhealth.com
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II. AUTOMATION DETAILS

2.1 Automation Overview

Item	Description
Area / Department	
Automation Name	Medical Necessity Review - Vitalware
Automation Description	Bot will perform Local Coverage Determination (LCD) lookup for cases in predefined work queues

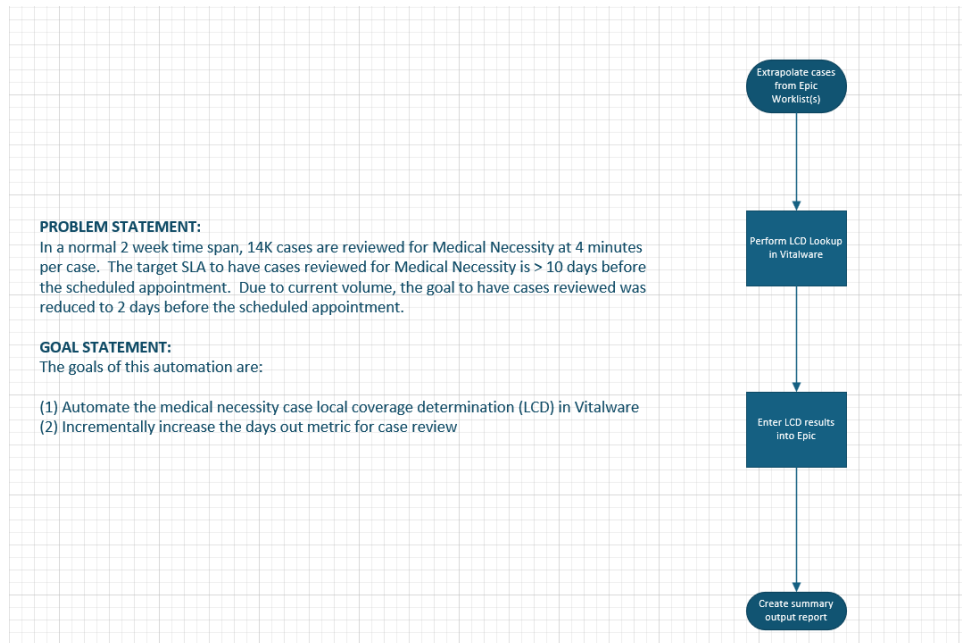
2.2 Applications

The table below lists the applications being utilized by the automation

Application	Comments / Access Needs
Epic	Require ability to obtain work queue cases and post LCD from Vitalware
Vitalware	Require ability to obtain LCD from combination of Procedure and Diagnosis codes

2.3 Global Process Map

The diagram below contains the steps the automation will take (the 'to-be' process map)



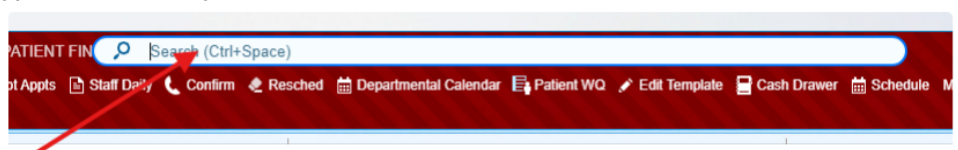
2.4 Detailed Process

Assumptions:

- Work queue data currently contains cases where LCD lookup is completed
- Cases remain in work queues until all downstream medical necessity review activities are completed
- Automation scope limited to Vitalware LCD lookup

Steps below outline the future state process:

1. Bot Schedule
 - a. Process will be run off hours (5PM – 8AM Central Time) to ensure that BOT does not collide with normal workflow [TBD with Ops Team]
2. Inbound Data Feed
 - a. Extract will be generated by Cogito Reporting Workbench and saved to shared drive to be picked up as start trigger
 - b. Shared drive location: [\\deaconess.com\shares\Departments\Multi-Departmental Projects\CIDA_Data_Architecture\UI Path](#)
 - c. UiPath Dispatcher to ingest data and drop into processing array
 - i. [COLUMN, DATA DETAILS TO BE DOCUMENTED ONCE EXTRACT FORMAT IS FINALIZED]
3. Identify all previously documented LCD
 - a. One time 'cleanup' to identify all records with a documented LCD
 - i. Login to Epic using stored credentials
 1. If login fails, end automation and send email to Ops
 - ii. Type 'Referral Entry' into search bar and select



iii. Enter Referral ID from Data array and click 'Search Referrals'

Launching Referral Entry

Patient

Referral ID (i)

Filter By

- Auth/Cert
- Exclude Auth/Cert
- Class
- Status
- To Department
- To Location/POS
- To Provider
- Type

Created From Created To

Search Referrals

Clear

1. If no results returned from Referral search, mark record as exception and move on to next record

a. Exception message: 'Referral search unsuccessful'

iv. Click 'Select Referral'

Launching Referral Entry

Patient

Referral ID (i)

Filter By

- Auth/Cert
- Exclude Auth/Cert
- Class
- Status
- To Department
- To Location/POS
- To Provider
- Type

Created From Created To

Search Referrals

Clear

Results Recent

ID #	Patient Name	Status	Created	Referred To	Referred to ...	Referred by ...	Orders	Diagnoses	Created
		PEND	07/15/2025						

1 referrals found. Max results: 10

Referral 11517345

Status: Pending Review - Pending Auth/VOI Effective from 7/15/2025

Priority: Routine - All Visits Scheduled

Referred By: Referred To:

Patient Demographics

Diagnoses

Procedures

0 out of 1 remaining

New Referral Select Referral Cancel

v. Select 'Communications'

- vi. Look for previous Vitalware/ Med Nec/ LCD note
 1. Write the following details to processing array
 - a. LCD Present (Yes/No)
 - b. Processing date/time (YYYY/MM/DD)
 - b. UiPath Performer to check for cases with previously entered LCD
 - i. For all cases where [LCD Present] = 'No'
 1. Move case into daily processing queue
 - ii. For all other cases, do not add to processing queue and move onto next record
4. Vitalware LCD lookup
 - a. Login to Vitalware (secure.vitalware.com) using stored credentials
 - i. For failed logon, create an exception with the following message:
'Vitalware credentials are not valid' and terminate automation
 - b. From top menu, click 'Code Validate' and select 'Outpatient/ Facility & Opps Calculator'
 
 - c. Expand 'Payer and CCI Details' section

d. Enter Static and Dynamic elements for LCD lookup

i. Static

1. Entity – Deaconess Health System
2. CCI – Medicare

ii. Dynamic

1. CPT Code – PxCPT from WQ
2. Diagnoses – ICD-10 from WQ
3. State – State from WQ
4. Contractor – Based on crosswalk below

State	Contractor
IN	08101
KY	15101
IL	05901

iii. Values not required

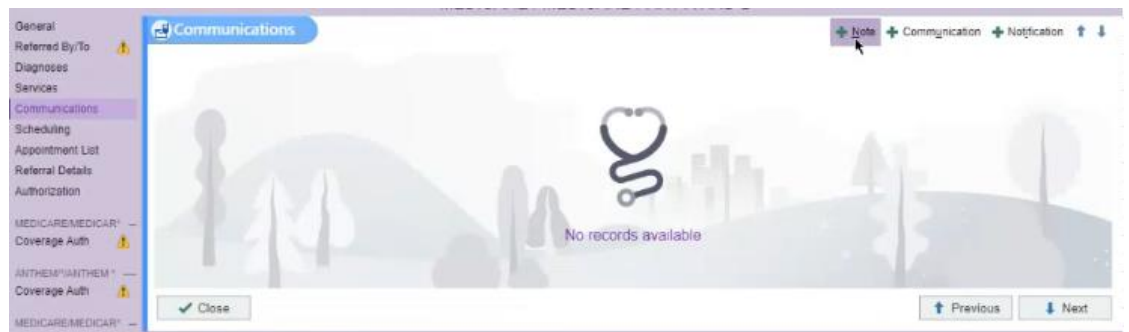
1. Service Start Date
2. End Date
3. Patient Gender

e. Click Validate

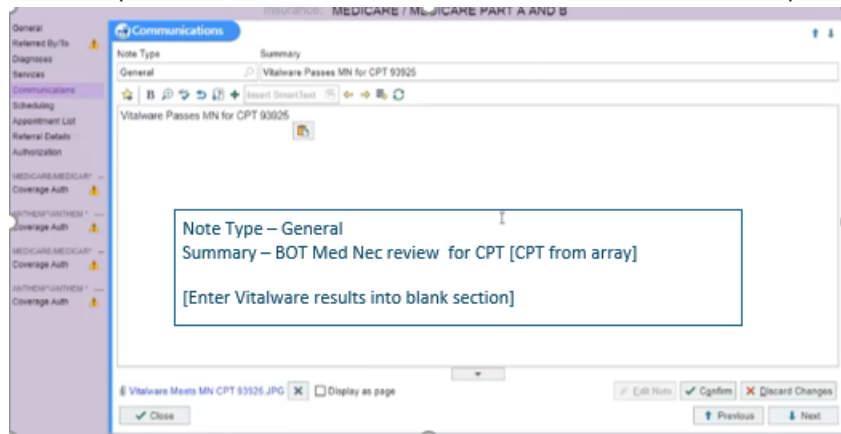
f. Results will appear as follows. Capture LCD for both CPT and DX

Code	Type	LCD
93925	CPT	A57593 * It is expected that non-invasive vascular studies would not be performed more than once a year, excluding place of service 21 or 23. A57593 Billing and Coding: Non-Invasive Peripheral Arterial Vascular Studies
173.9	DK	- Per policy A57593, 173.9 supports medical necessity. - A57593 Billing and Coding: Non-Invasive Peripheral Arterial Vascular Studies * Use for claudication and intermittent claudication. - A57593 Billing and Coding: Non-Invasive Peripheral Arterial Vascular Studies

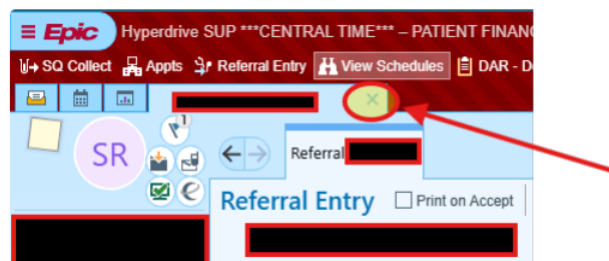
- i. If results appear, capture results and save in bot log for later entry into Epic
 - ii. If results do not appear, create an exception with the following message – 'No LCD results found in Vitalware'
5. Enter LCD results into Epic
- a. Repeat steps III (a) (i-v)
 - b. Click 'Note'



- c. Enter Required information into note and click 'Confirm' once completed



- i. Enter value into [LCD Present] = 'Yes'
- d. Close record/ Referral entry function



- e. Output reporting [Additional technical details to be filled in as tool is built/finalized]
- f. Upon completion of daily case run, bot log content will be uploaded into UiPath Data Fabric
 - i. Column data delineated in Plan Toolkit
- g. Data will then be translated into reporting queue
 - i. From reporting queue, daily output report with summary of bot activity, exceptions and LCD results will be shared
 - ii. GOAL: For Operations Team to leverage output reporting as worklist
 - iii. Additional tools to be considered
 - 1. UiPath Insights – Create reporting dashboard to highlight key metrics/ activities

2.4 Toolkit documentation

The table below provides a list of toolkits and links to the completed ROI, planning toolkits, and any additional design documentation

Toolkit	Link to documentation	Comments
Plan Toolkit		

2.5 Out of scope

The table below provides a list of automation scenarios or account populations that are out of scope or unobtainable

Scenario / Population	Rationale	Comments
Downstream tasks post LCD	Tasks require more cognitive thought	Further exploration of downstream process may yield opportunity for RPA

III.APPROVAL

3.1 Approval

Upon review and approval of this Process Definition Document (PDD), I, Connie Conger on 10/29/2025 hereby approve this plan for development.

I acknowledge that while this automation will experience downtime, the ultimate responsibility for the process remains with my department. I commit to collaborating with the automation team to

maintain the automation and meet our uptime goal. This commitment extends to ongoing responsibilities, including but not limited to: testing, implementing enhancements, handling break-fix scenarios, managing application upgrades, and supporting process changes or improvements as required.

3.2 Future Initiatives

Below is a list of future operational, technical, or known application changes that may impact the automation

- Epic currently at Version: February 2025. There are 2 planned upgrades in 2026:
 1. The first Epic Upgrade project is already underway and involves a double upgrade, bringing us to versions May 2025 and August 2025. We plan to upgrade our Epic production environment on Sunday, April 12, 2026.
 2. Following that, in early May, we'll kick off our next Epic Upgrade project. This will also be a double upgrade, taking us to versions November 2025 and February 2026. The upgrade for this project is scheduled for Sunday, July 12, 2026.

3.3 Downtime Plans

Below are the actions the operational team will take in the event of automation downtime

Scenario	Action (taken by operations)	Contact
Level 1 <i>Downtime = 1-2 days</i>		
Level 2 <i>Downtime = 2-7 days</i>		
Level 3 <i>Downtime = 7-14 days</i>		
Level 4 <i>Downtime = Indefinitely</i>		

3.4 Revisions

Complete the table below for any document revisions

Rev. #	Date	Section/page	Revision summary	Author
1	9/9/2025	All	Added detailed prose	Michael Bordador
2	9/12/2025	All	Content refinement	Michael Bordador
3	9/16/2025	All	Content refinement	Michael Bordador
4	9/19/2025	Output reporting	Content revision	Michael Bordador
5	10/19/2025	All	Content revision	Michael Bordador
6	4/3/2026	3.2 Future Initiatives	Added Epic upgrades for 2026	Kim Anderson