Deaconess Health
Prepayment Requests –
Anthem & Humana
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.

Table of Contents

I. AUTOMATION OVERVIEW

1.1 Objectives

The automation will achieve

- Fulfillment of additional documentation requests from Anthem and Humana via Availity
  - Downloading documentation in Epic
  - Uploading documentation into Availity
  - Notation of upload into Epic

1.2 Operational metrics

The automation will impact the following operational metrics

- [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
Polly Masterson	Operational Owner	Polly.Masterson@hcrsolutions.com
Sharla Ahrens	Operational SME(s)	Sharla.Ahrens@hcrsolutions.com
Michael Bordador	Solution Architect	Michael.Bordador@tarponhealth.com
Manmohit Luthra	Developer	Manmohit.Luthra@tarponhealth.com

II. AUTOMATION DETAILS

2.1 Automation Overview

Item	Description
Area / Department	Revenue Cycle
Automation Name	Prepayment Requests
Automation Description	Bot will fulfill documentation requests from Anthem and Humana via Availity

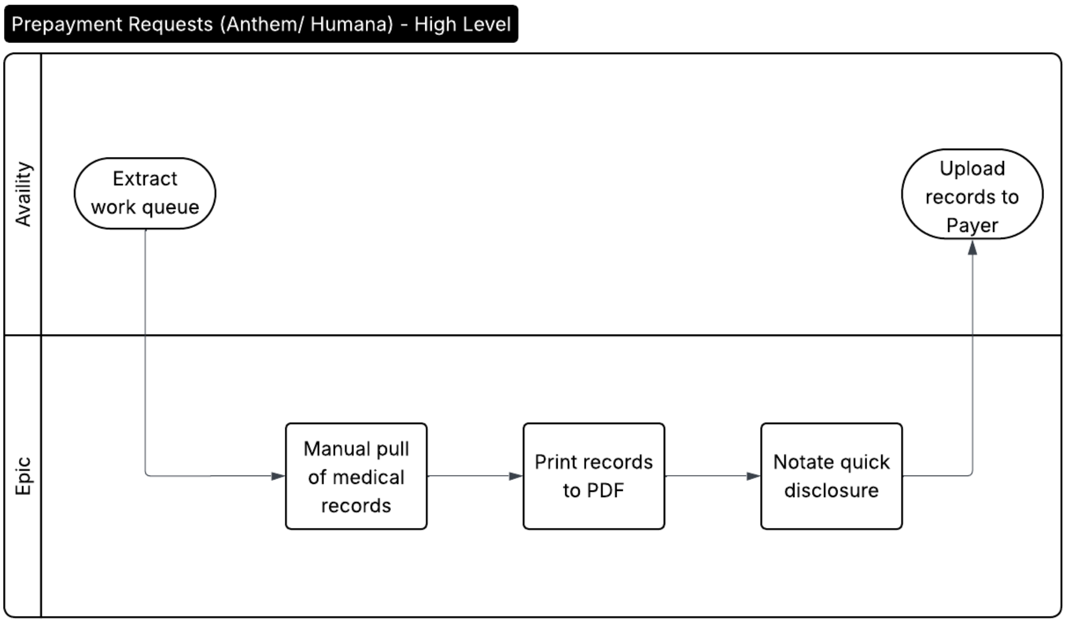
2.2 Applications

The table below lists the applications being utilized by automation.

Application	Comments / Access Needs
Availity	Require ability to retrieve document requests
Epic	Require ability to download documents and notate accounts

2.3 Global Process Map

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



2.4 Detailed Process

2.4.1 Assumptions

- Process will leverage a Dispatcher – Performer architecture
- Process will be limited to inbound requests from Anthem and Humana in Availity
- Bot schedule
    - Process will be run off hours (5PM – 5AM Eastern Time) to ensure that BOT does not collide with normal workflow

2.4.2 Steps below outline the future state process:

2.4.2.1 UiPath Dispatcher

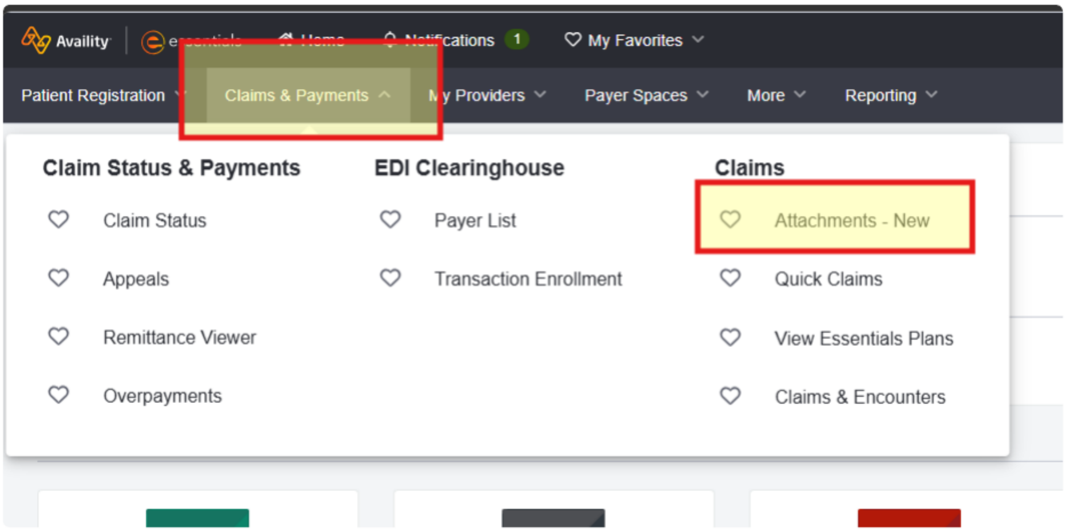
1.1 Login to Availity storefront with stored credentials

1.1.1 https://essentials.availity.com/static/public/onb/onboarding-ui-apps/availity-fr-ui/?_gl=1*ai2t2j*_gcl_au*MTY4MTMxMzM1OS4xNzY1NDAyMDUx*_ga*MzgyMTMwODQyLjE3NjU0MDIwNTE.*_ga_E2R9S4EQP7*czE3NjU0MDIwNTEkbzEkZzAkdDE3NjU0MDIwNTEkajYwJGwwJGgw#/login

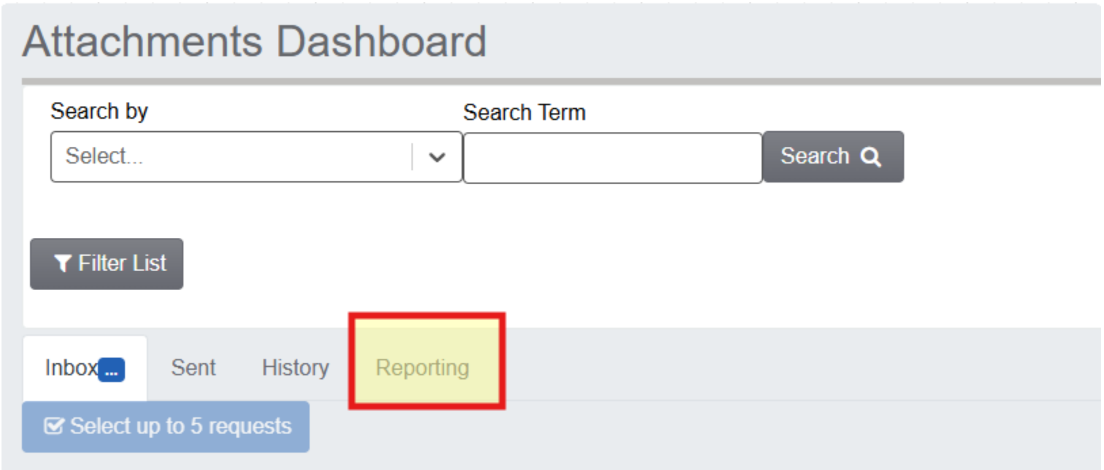
1.2 Complete multi factor authentication

1.3 If login is successful, then proceed to (2.1)
1.4 If login is not successful, retry login with stored credentials 3 times
1.5 If retry is successful, then proceed to (2.1)
1.6 If retry is not successful, log the following system exception (SI1)
1.6.1 Message: Cannot login to Availity
1.6.2 Action: Email notification to Operations team, terminate automation
1.6.3 Log: Failure

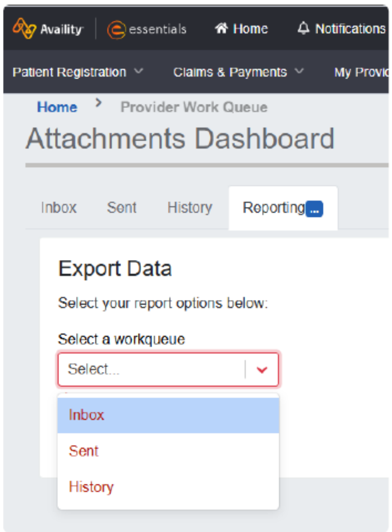
2.1 Export Anthem worklist
2.2 Click 'Claims and Payments' and select 'Attachments-New'



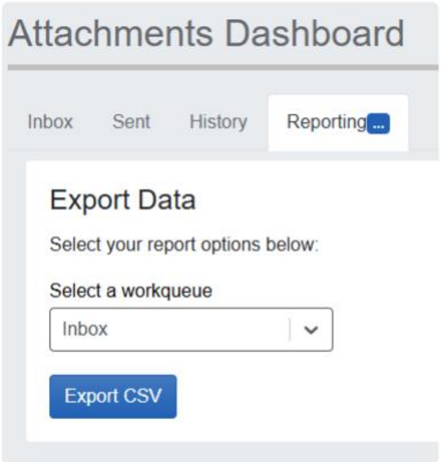
2.3 Select 'Reporting'



2.4 Select 'Inbox' from 'Select a work' drop down



2.5 Select 'Export CSV'



2.6 Filter output report

2.6.1 Patient Account Number to contain only the following prefixes:
2.6.1.1 PB
2.6.1.2 SP
2.6.1.3 FH
2.6.1.4 BD
2.6.1.5 PD
2.6.1.6 JP

2.6.2 TIN to contain the following values:
2.6.2.1 350593390
2.6.2.2 263083364
2.6.2.3 352062016
2.6.2.4 350877575
2.6.2.5 351870378
2.6.2.6 610461753
2.6.2.7 862614124

2.6.2.8 350985964
2.6.2.9 824503095
2.6.2.10 201244058
2.6.2.11 863269008
2.6.2.12 920574205
2.6.2.13 920904755
2.6.2.14 610482973

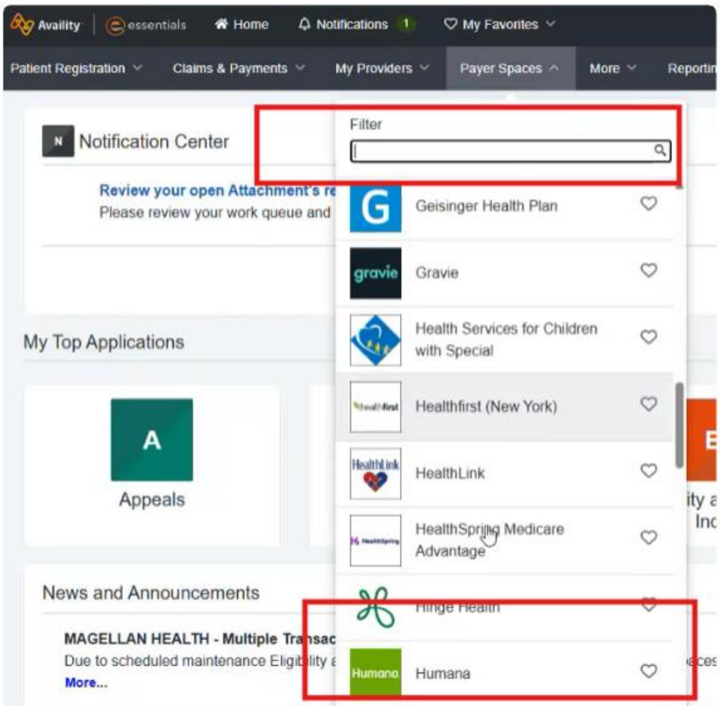
2.6.3 For records with account prefix BD
2.6.3.1 Include ONLY records > 10/1/2024

2.6.4 For records with account prefix PD
2.6.4.1 Include ONLY records > 4/1/2023

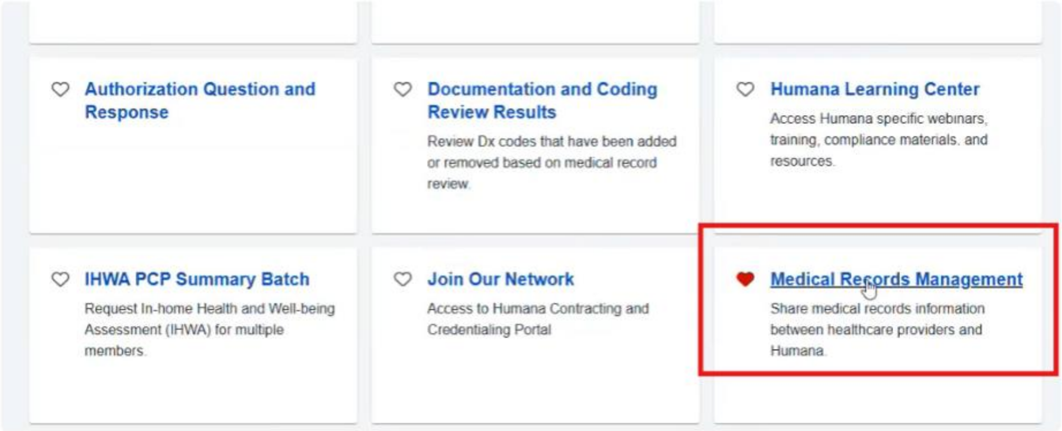
2.6.5 For records with account prefix JP
2.6.5.1 Include ONLY records > 10/1/2025

2.7 Capture the following columns for the UiPath queue
2.7.1 Availity Request ID
2.7.2 Patient Name
2.7.3 Patient Account Number
2.7.4 Service From
2.7.5 Provider Name
2.7.6 TIN
2.7.7 Status

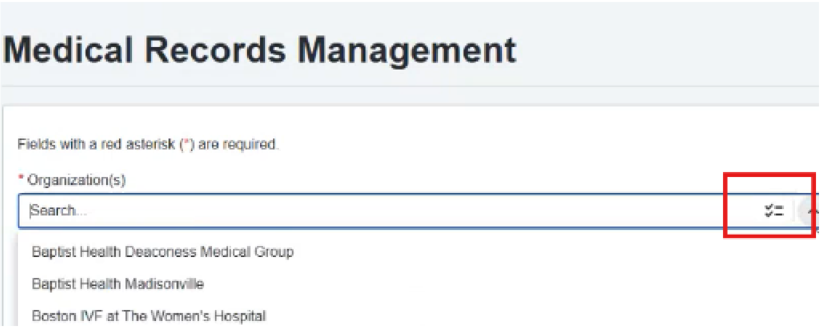
3.1 Export Humana Worklist
3.1.1 Click 'Payer Spaces' and select 'Humana'



3.1.2 Select 'Medical Records Management'



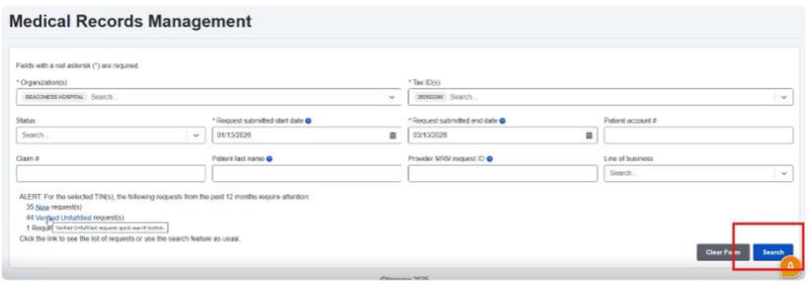
3.1.3 Click Checkboxes in 'Organizations' drop down and select all facilities



3.1.4 Enter in scope TaxIDs into 'TaxID(s)' field

<u>Tax ID Numbers:</u>
· 263083364 Deaconess Clinic
· 350593390 Deaconess Hospital/Deaconess Care Group
· 610461753 Methodist Hospital
· 271432205 Merral Lewis
· 351870378 Midwest Internal Medicine
· 824503095 Deaconess Specialty Physicians
· 350877575 Gibson General Hospital
· 352062016 The Women's Hospital
· 920574205 Deaconess Illinois Clinic
· 920904755 Deaconess Care Group Illinois
· 920904755 Deaconess Illinois Specialty Clinic
· 920904755 Deaconess Illinois ER Physician's
· 863269008 Baptist Health Deaconess Madisonville
· 201244058 Ferrell Hospital
· 610482973 Jennie Stuart Health System
· 862614124 Deaconess Union County
· 350985964 Deaconess Memorial Medical Center

3.1.5 Click 'Search'



3.1.6 Click 'Export Requests to Excel'

3.1.7 Capture the following columns for the UiPath queue
3.1.7.1 Availity Request ID
3.1.7.2 Patient Name
3.1.7.3 Patient Account Number
3.1.7.4 Service From
3.1.7.5 Provider Name
3.1.7.6 TIN
3.1.7.7 Status

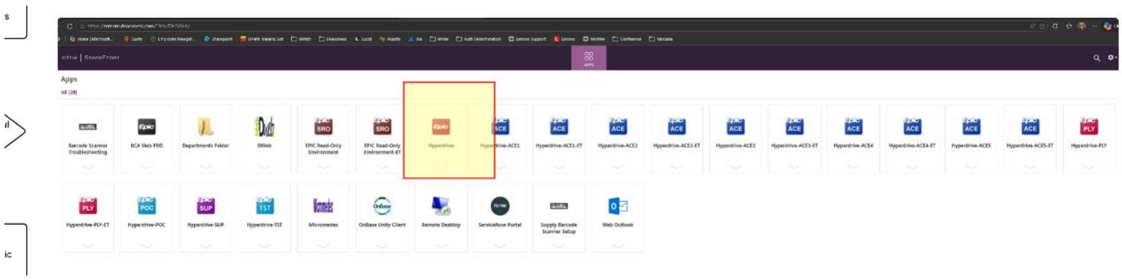
4.1 Collect data into UiPath work with the mappings below:

UiPath Queue	Anthem Extract Value	Humana Extract Value
Request ID	Availity Request ID	Request ID
Patient Name	Patient Name	Member Name
Account Number	Patient Account Number	Patient Account #
DOS	Service From	Date of Service Start
Provider Name	Provider Name	Provider Name
TIN	TIN	Provider Tax ID
Status	Status	Status
Epic Pt ID		
CPT		
Provider		

5.1 End Dispatcher

2.4.2.2 UiPath Performer

1.1 Launch Applications
1.1.1 Availity (2.4.2.1, 1.1)
1.1.2 Epic
1.1.2.1 Launch from Citrix storefront

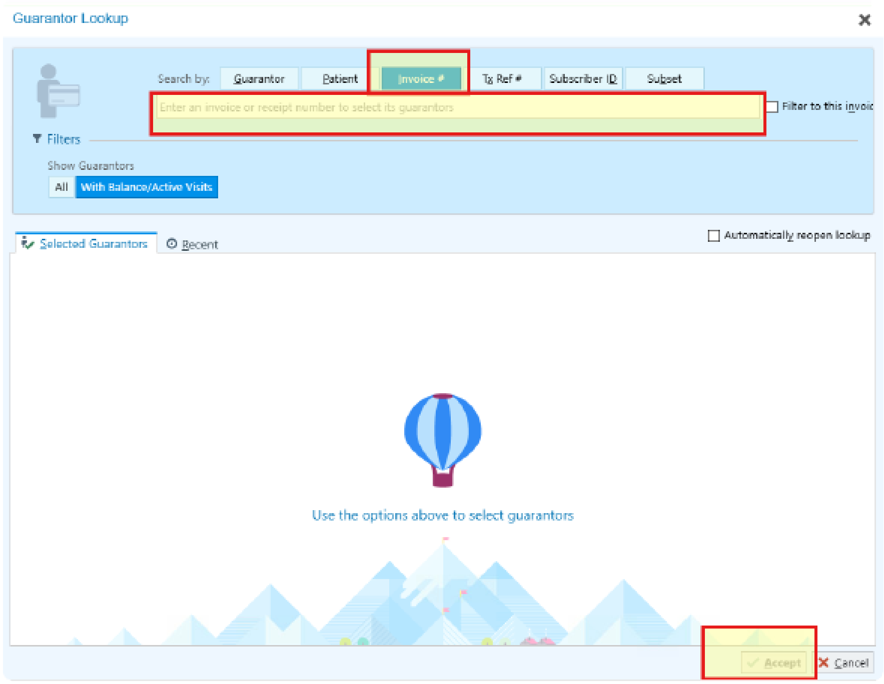


1.1.2.2 Login with stored credentials
1.1.2.2.1 If login is not successful, retry login with stored credentials 3 times
1.1.2.3 If retry is not successful, log the following system exception (SI2)
1.1.2.3.1 Message: Cannot login to Availity
1.1.2.3.2 Action: Email notification to Operations team, terminate automation
1.1.2.3.3 Log: Failure

1.2 Connect to UiPath work from Dispatcher activity

1.3 Search for Patient in Epic

1.3.1 Launch Guarantor Account Lookup



1.3.2 Enter Patient Account Number from UiPath queue into Invoice # search

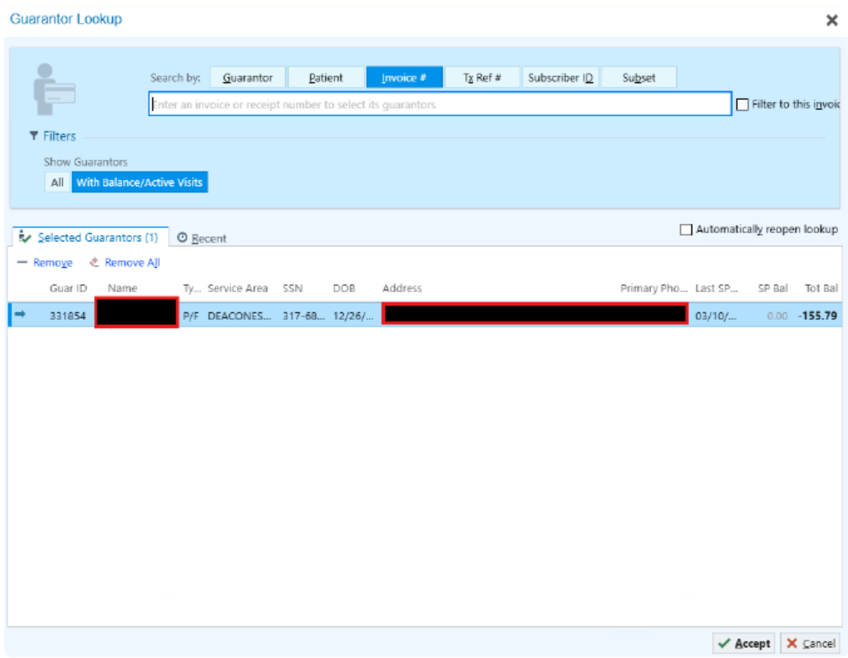
1.3.2.1 If no results, create business exception (BI1)

1.3.2.1.1 Message: Account lookup in Epic produced null results

1.3.2.1.2 Action: Move to next record in processing queue

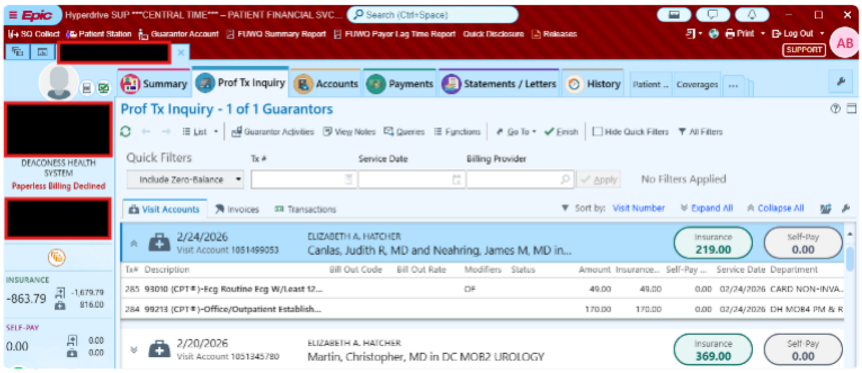
1.3.2.1.3 Result: Failure

1.3.2.2 If results are generated, click 'Accept' to open record

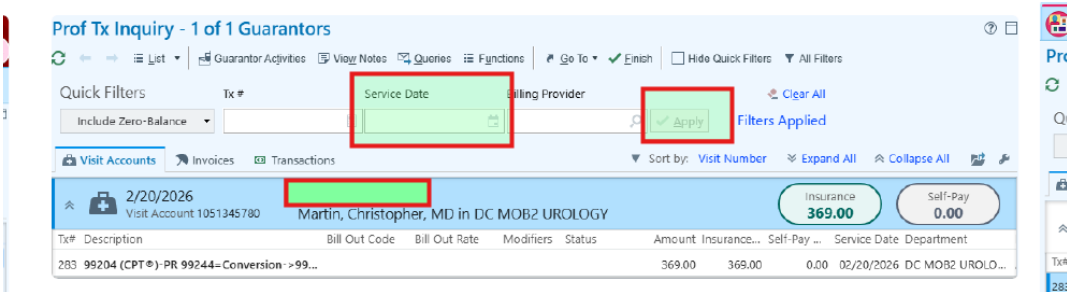


1.4 Extract Medical Records

1.4.1 Select 'Prof Tx Inquiry' tab



1.4.2 Enter 'DOS' from UiPath queue into 'Service Date' filter and click 'Apply'



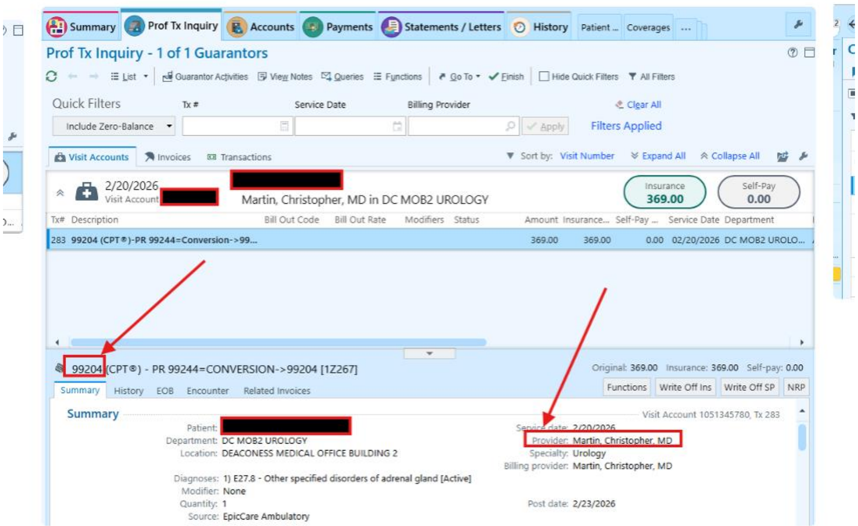
1.4.3 If no results are returned, create business exception (BI1)

1.4.3.1 Message: No records available for DOS

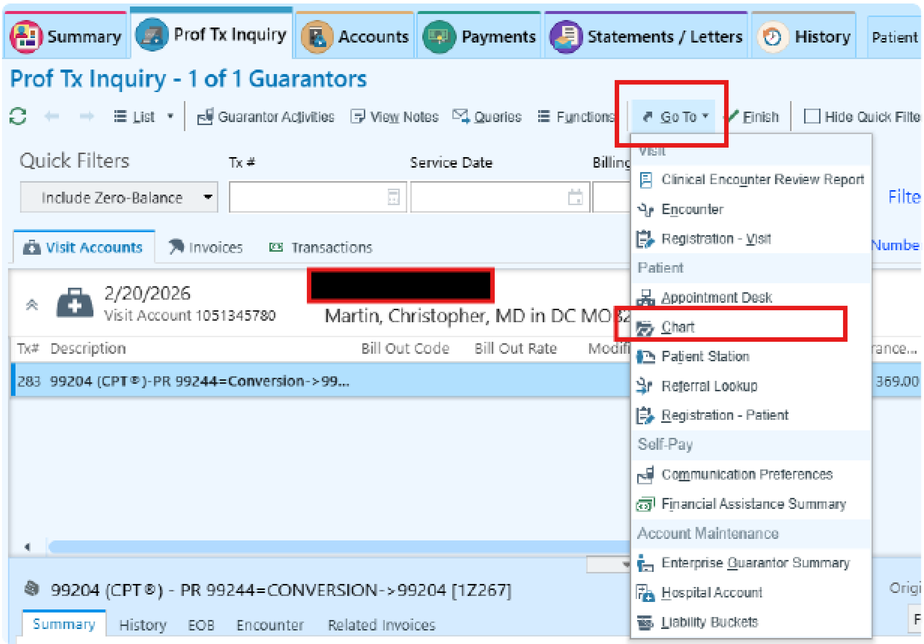
1.4.3.2 Action: Move to next record in processing queue

1.4.3.3 Result: Failure

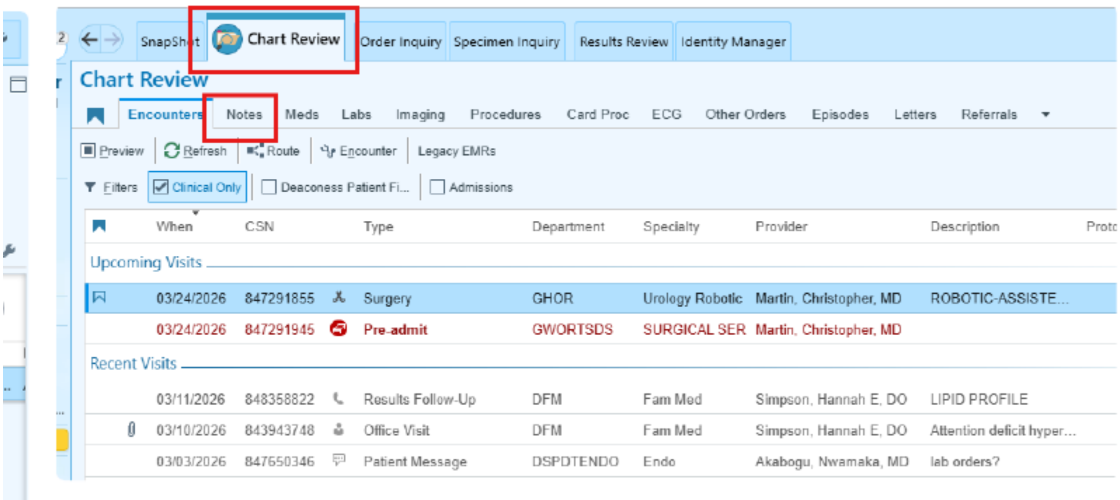
1.4.4 Collect 'Provider' and CPT and add to UiPath queue



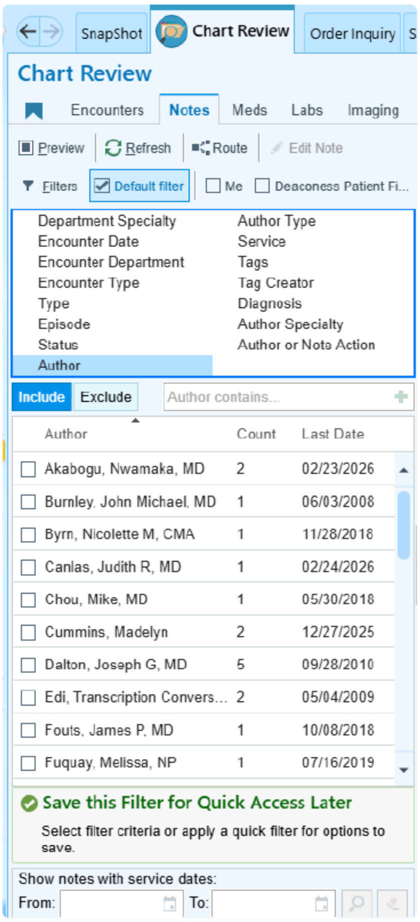
1.4.5 Click 'GoTo' button and select ' Chart'



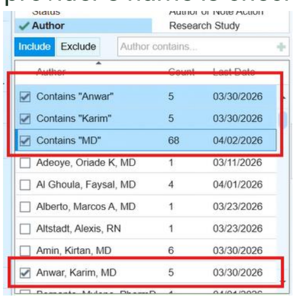
1.4.6 Click 'Chart Review' tab and select 'Notes' section



1.4.7 Apply 'Date' filter from DOS in UiPath WQ



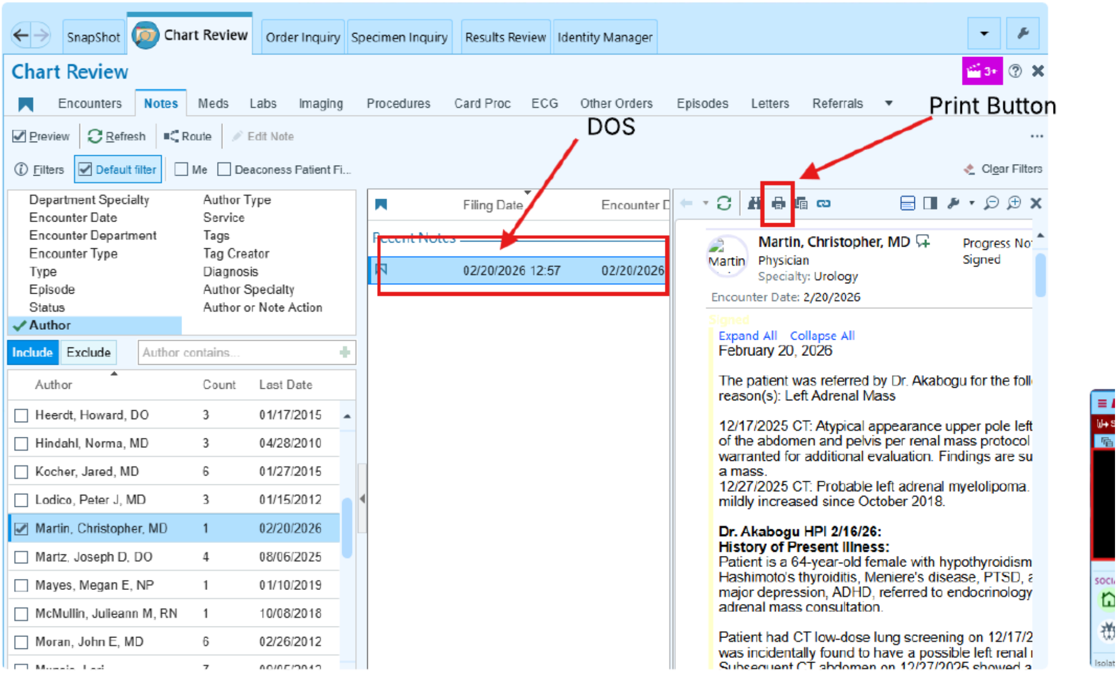
1.4.8 Filter by 'Author' with 'Provider' value in UiPath queue
**Minor change: when searching for Author, Epic automatically selects other boxes named "contains". These need to be un-checked to not pull unnecessary data. Make sure only provider's name is checked. Approved by Sharla, 4/27/2026. See example below:



1.4.9 If no data is returned, then create Business Exception (BI2)

1.4.9.1 Message: No data returned for PT DOS
1.4.9.2 Action: Move on to next record
1.4.9.3 Log: Failure

1.4.10 Select notes applicable to DOS



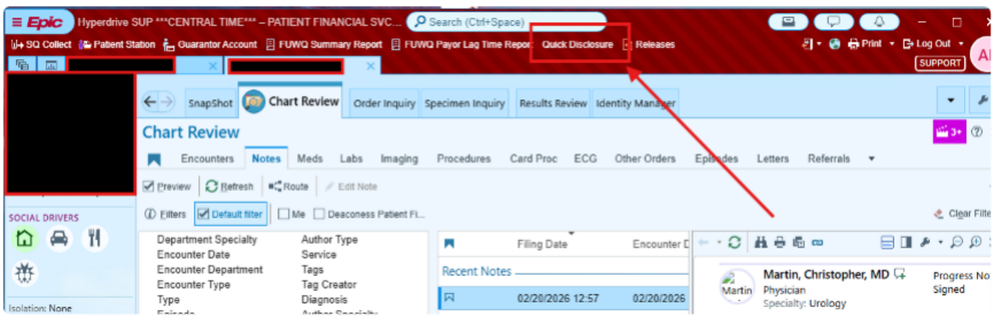
1.4.11 Click 'Print' to uncover Print to PDF function

1.4.12 Save file with designated naming convention to shared folder

1.4.12.1.1 [Patient Name][DOS]

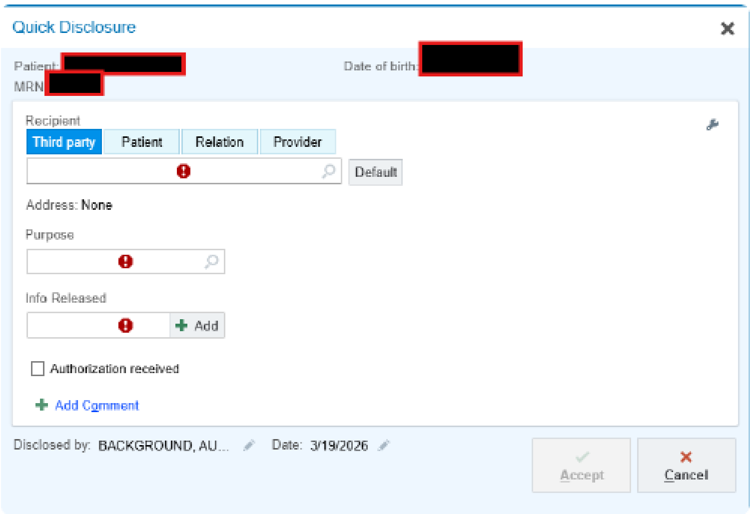
ex. MamaBear03192026

1.4.13 Click 'Quick Disclosure' and click patient in 'currently open' box



1.4.14 Anthem Quick Disclosure

1.4.14.1 Type 'Anthem' and select 'Anthem [8100000485]' in 'Recipient' field

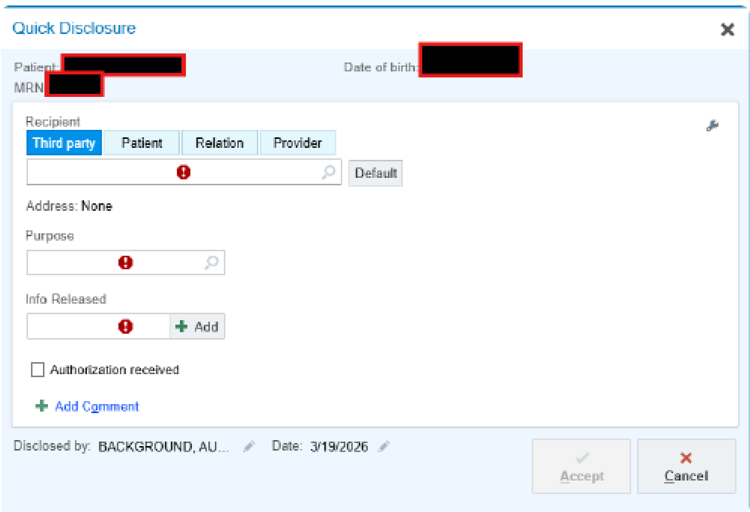


1.4.14.2 Select 'Billing/ Claims Additional Info' for 'Purpose' and 'Progress Notes' for 'Info Released'

1.4.14.3 Click ‘Accept’

1.4.15 Humana Quick Disclosure

1.4.15.1 Type 'Humana' and select 'Humana [810003303] from drop down into ‘Recipient’ field



1.4.15.2 Select 'Billing/ Claims Additional Info' for 'Purpose' and 'Progress Notes' for 'Info Released'

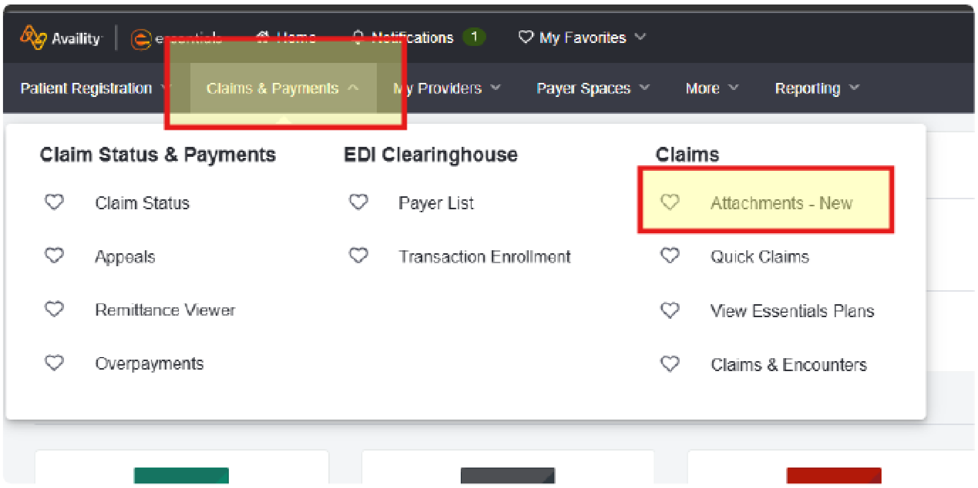
1.4.15.3 Click ‘Accept’

1.5 Attach medical records into Availity

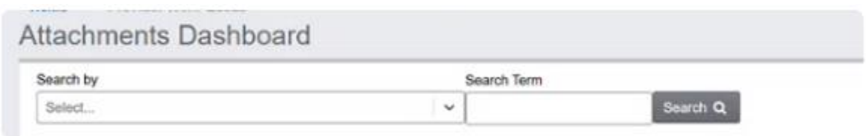
1.5.1 Launch Availity

1.5.2 Attach records for Anthem

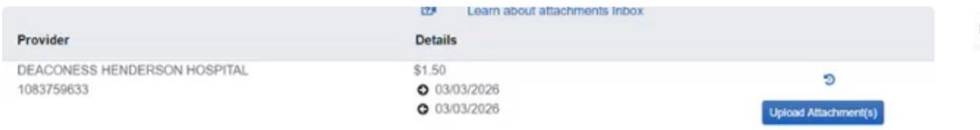
1.5.2.1 Click 'Claims & Payments' and select 'Attachments-New'



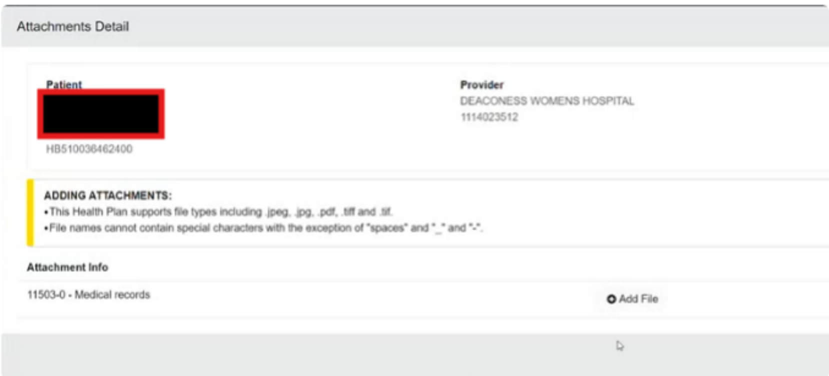
1.5.2.2 Search for record using 'Patient Account Number' from UiPath s and click 'Search'



1.5.2.3 Click 'Upload Attachments'

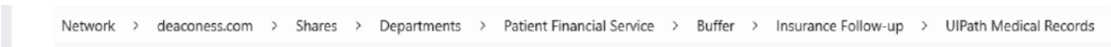


1.5.2.4 Click 'Add File'



1.5.2.5 Navigate to shared folder and identify file [Patient Name][DOS]

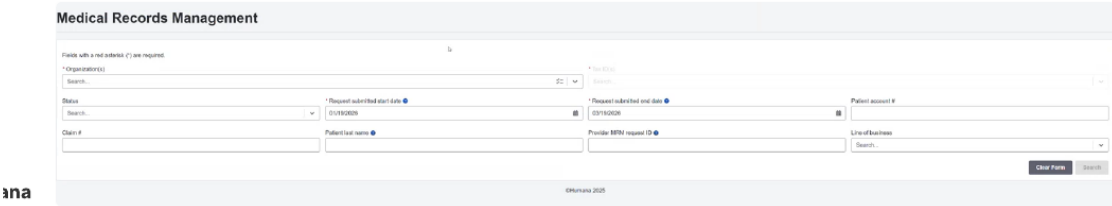
1.5.2.5.1 Shared folder path



1.5.2.6 Click 'Submit

1.5.3 Attach records for Humana

1.5.3.1 Select 'Organization' from 'Provider Name' in UiPath



1.5.3.2 Enter 'TIN' from UiPath into 'Tax ID' field
1.5.3.3 Enter 'Patient Account Number' from UiPath into 'Patient account # field
1.5.3.4 Click 'Search'
1.5.3.5 Click 3 bars under 'Action' field and select 'Upload'

1.5.3.6 Under 'Document Type' select Medical Record
1.5.3.7 Click 'Browse Files'
1.5.3.8 Navigate to shared folder and identify file [Patient Name][DOS]
1.5.3.9 Click 'Submit'

1.6 Terminate all applications

1.7 End Performer

NOTE and BI Enhancement

Adding Billing Indicator:

1. From UiPath queue

1.1 Pull patient acct number

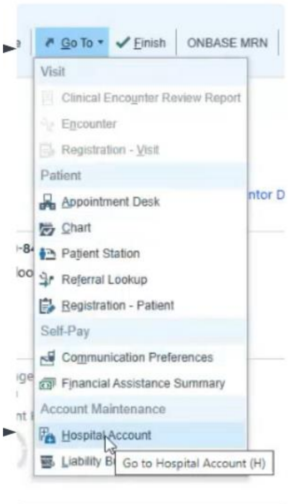
1.2 Pull date of service

2. Go back to Epic

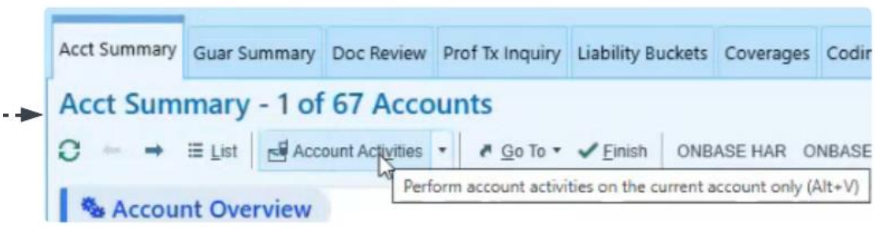
3. Select Prof TX Inquiry tab

4. Select Go To

5. Select Hospital Account

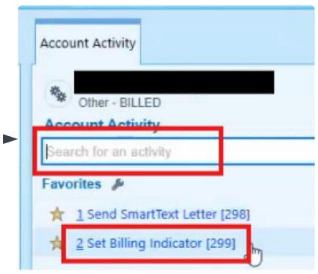


6. Click the acct summary tab and account activities



7. Account activities will appear on right side of screen

8. In search box enter set billing indicator [299]



9. In Note area enter:

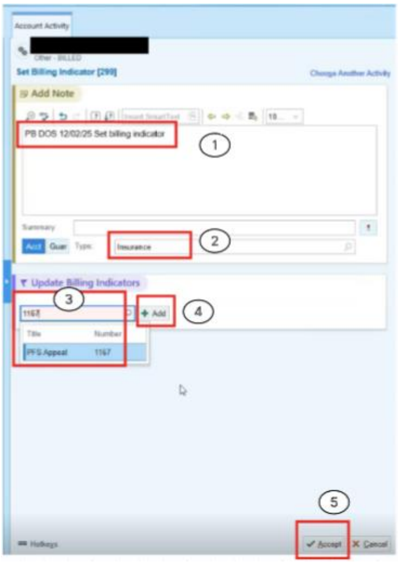
9.1 PB Pat Acct #__ DOS ___ Set billing indicator

9.2 Select Insurance

9.3 Select billing indicator: 1167

9.4 Select the add button

9.5 Select accept in bottom right or screen



Add Note

10. From UiPath queue

10.1 Pull date of service

10.2 Pull provider name

10.3 Humana or Anthem

11. While in patient’s account in Epic, Go to Prof TX Inquiry tab

12. Select guarantor activities

13. In the right-side pop-up panel

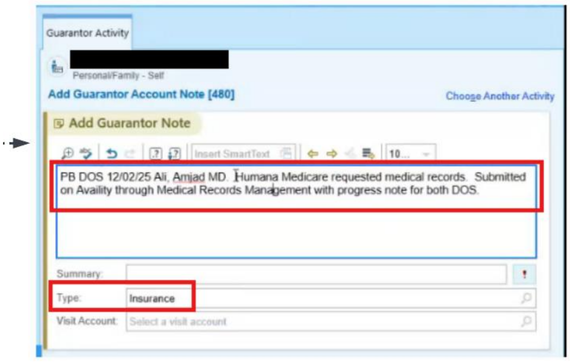
13.1 Enter Add guarantor account note [480]

14. In note area enter for Humana:

14.1 PB DOS___, Name of provider ____ (last, first, credential, however listed in Availity)

Humana requested medical records. Submitted on Availity through Medical Records Management with progress note for DOS.
Select Insurance in type

See Example for Humana



OR:

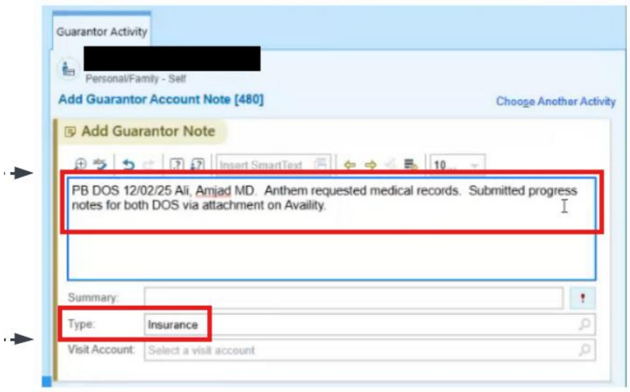
14.2 In Note area enter for ANTHEM:

PB DOS ____ , name of provider _________(last, first, credential, however listed in Availity)

Anthem requested medical records. Submitted progress notes for DOS via attachment on Availity.

Select Insurance in type

See Example for Anthem



15. Click accept at the bottom right

16. Go back to main process, step

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		Detailed description of input and output fields

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
Exclude Select Specialty and Encompass locations	Current workflow requires manual outreach (fax or secure email), often taking up to 14 days. 15-20% of the volume	These items will fall as exceptions for manual intervention.
Exclude Skilled Nursing Facilities	Scanned document dates won't match the date of service. Could be up to 1 month date difference	These items will fall as exceptions for manual intervention.

2 APPROVAL

3.1 Approval

Upon review and approval of this Process Definition Document (PDD), I, ______ on _________ 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 *Downtime = 1-2 days*		
Level 2 *Downtime = 2-7 days*		
Level 3 *Downtime = 7-14 days*		
Level 4 *Downtime = Indefinitely*		

3.4 Revisions

Complete the table below for any document revisions

Rev. #	Date	Section/page	Revision summary	Author
1	3/19/2026	All	Added detailed prose	Michael Bordador
2	4/3/2026	3.2	Added Epic upgrades for 2026	Kim Anderson
3	4/7/2026	2.5	Added out of scope items	Kim Anderson
	4/17/2026		Approved	Business Team
	4/27/2026	1.4.8	Clarification, approved by business	Kim Anderson