

Process Design Document / Solution Design Document

Process Name: FQHC - No Show Letters Automation – Phase 6

Purpose of Document

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

TABLE OF CONTENTS

1. Document Control	4
2. Document Details.....	5
2.1 Purpose Of This Document	5
3. Current State Process Description	5
3.1 Process Summary	5
3.2 Data Flow & Applications.....	5
3.2.1 Input	5
3.2.2 Output.....	5
3.2.3 Applications.....	6
3.3 Business Rules	6
3.4 Current State Metrics.....	6
3.5 Current State Process Flow.....	7
4. Future State Process Description.....	8
4.1 Future State Process Flow	8
4.2 In Scope For RPA.....	9
4.3 Out Of Scope For RPA.....	9
4.4 Future State Detailed Steps	9
4.5 Exceptions In The Process Flow	9
4.6 System Errors	10
4.7 Process Continuity.....	10
5. Technical Details.....	10
6. Reporting.....	11
7. Environment Details.....	11
8. Assumptions.....	12
9. Additional sources of process documentation.....	12
10. Appendix	12

10.1 Glossary.....	12
--------------------	----

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	4/18/22			Initial Draft
1.0 Phase 3	7/6/22			Policy Change
1.0 Phase 4	10/7/22			Epic Upgrade 11/6/22 New Screenshots
1.0 Phase 5	5/17/23			Epic Upgrade Spring 2023 Hyperdrive
1.0 Phase 6	9/13/23			Epic Upgrade Fall Oct 2023

REVIEW

Role	Name	Date
Process Owner	Jessica Wallace	10/10/22
Process Owner	Kathy Hall	10/10/22

STAKEHOLDERS

Role	Name	Email
Process Owner		
Process Owner		
Business Architect		
IAH Director		
Developer		
HIT Epic Member		

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 'FQHC No Show Letters' process.

3. Current State Process Description

3.1 PROCESS SUMMARY

Currently when patients are a no-show for their in-person appointments, clinic staff manually sends no show letters to patients' home addresses. Automation will identify these no- show patients and will print and send the no show letters to patients addresses using Geisinger's print shop.

Data Flow & Applications

3.1.1 INPUT

Input	Format	Location	Is it natively digital?	Is it structured?
-------	--------	----------	-------------------------	-------------------

Epic	Epic No Show list	Epic	Yes	Yes
------	-------------------	------	-----	-----

3.1.2 OUTPUT

Output	Format	Location	Frequency	Comment
No Show Letters - PDF	PDF	Desktop Application	Created daily for T-4 from date of service	No show letters that Bot saves in the network folder for FTP transfer to Print Shop's network folder daily
Excel (Daily Reports)	.XLX	Office Application	Sent daily for T-4 from date of service	Report containing success, business exceptions and system exceptions

3.1.3 APPLICATIONS

Application	Version	Interface	Req Key / Operation / URL	Comment
Epic	2016	Desktop Application	N/A	IAHNOSHOW
Outlook	2016	Desktop Application	N/A	Assigned BOT account
Excel	2016	Desktop Application	N/A	
Network Folder			\\geisinger.edu\dfs\0004\0610\610063	

3.2 BUSINESS RULES

Rule	Detail
Automation frequency	Daily (6 days a week) Monday to Saturday for T-4 from date of service
Bot start time	TBD

Excluding weekends and holidays	No
SLAs	TBD

3.3 CURRENT STATE METRICS

Avg. Monthly Transactions	# Batches Monthly	Avg. Volume / Batch	Weekly Avg. Volume	Frequency
70 no shows each run X 24 runs a month	6 times a week X 4 weeks a month	70 no shows each run	70 no shows each run X 6 runs a week	Daily (Monday to Saturday)

3.4 CURRENT STATE PROCESS FLOW

High Level Process Flow Diagram (Current state):

1. Staff clicks Epic > Scheduling > worklists > follow-up
2. Staff runs the follow up report for log in dept > no show appt status > date range
3. Staff highlights a patient and clicks on Appt Desk
4. Staff records the primary language
5. Staff creates a letters encounter using no show department name and provider
6. Staff opens the appropriate no show letter in appropriate language (Spanish or English)
7. Staff clicks F2 and completes the information in the letter
8. Staff clicks print/mark as sent/accept and print the letter
9. Staff envelopes and mails the letter to patient
10. Staff adds a message from the follow up list and removes the patient from the report

High Level Process Steps (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 Epic
2. Bot will click Epic > Scheduling > Worklist > Follow-up > No Shows
3. Bot will run the report for All FQHC departments, for no show appts for T-4 date
4. Bot will pick the first patient and will click on Appt Desk
5. Bot will check patient's primary language

6. Bot will look at the Past encounters in any department within the service line (FQHC) included in the scope of this project
7. Bot will create a letters encounter using no show department and provider
8. Bot will pick No show letter in patients' primary language per service line
9. Bot will complete the no show letter by clicking F2 and completing *** fields
10. Bot will add the letter number and send by BOT in the comments
11. BOT will click print, mark as sent and accept and save the letter as PDF.
12. BOT will go back to the follow up report and click Message and type 'no show letter was sent on T date'
13. Bot will click Remove to remove and type 'Letter sent'
14. Bot will repeat all the steps until no patient left in the list for the no-show status report
15. Bot will send the no show letter PDFs to Print Shops network folder
16. Bot will send a list of patients who received the letters as well as the list of business and system exceptions to the 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
N/A			

4.4 FUTURE STATE DETAILED STEPS

1. Bot will log into Epic by typing the username and password, and click Log in
2. Bot will type 341107 for log in department and click Continue
3. Bot will click **Continue**
4. Bot will click Epic> Scheduling> Work Lists > Follow-Up
 - Bot will Click List under Departments and type the list of department numbers
 - 341107 Fam Prac CommunityCare Hazleton
 - 341100 Fam Prac CommunityCare Kistler
 - 341109 Peds CommunityCare Hazleton
 - 341102 Peds CommunityCare Kistler
 - Bot will put from date: t-4, to date: t-4
 - Bot will click list under Appointment Status and type: No Show and press enter
 - Bot will click RUN
5. Bot will grab the number of patients show up in the follow up report:
This number will be used in the output file in "Patients in No Show Report"
6. Once the report is completed, Bot will click once on the first patient and click Appt Desk
7. If Bot lands on the break the glass window, it will click Cancel and move on to the next patient.
Break the Glass patients will be reported as business exceptions
8. If Bot lands on Patient Chart Advisories tab or any other tab, BOT will click to APPT Desk task
 - If Covid recovery encounter pop up show up, Bot will click OK to continue:
 - If the deceased patient pop-up opens up, Bot will click OK
 - Deceased patients will be reported as business exceptions. Bot will exit the patient's appointment desk, and start processing the next patient
9. Bot will record patients preferred language and MRN:
 - a. English: will receive English letters
 - b. Spanish: will receive Spanish letters
 - c. Nepali: will receive Nepali letters
 - d. Arabic: will receive Arabic letters
 - e. Vietnamese: will receive Vietnamese letters
 - f. Russian: will receive Russian letters
 - g. Chinese: will receive Chinese letters
 - h. Any other: will receive English letters
 - i. If BOT cannot obtain patient's preferred language – Bot will use English letters
10. Bot will click on PAST tab:
11. Bot will look at the T-4 no show FQHC encounter:

- a. Bot will find the very recent 'FQHC encounter' (T-4) that is a no show
- b. Bot will look at the very last no show encounter date (which will be T-4), encounter department and encounter provider. (Encounter department and encounter provider will be used to create letters encounter)

Admitted Status:

Bot will use API check to look if the patient was in admitted status during this visit date (T-4)

- **Admitted:** Hospital Encounter during the time period T-4, Status:(Discharge, Admission, Pre-admission, In Progress, or Triage (for ED visits), and not cancelled)
- **Admitted patients will be reported out as business exception**

12. If patient have a completed and no show visit under any of the inclusion departments from the same no show date (T-4), Bot will report this patient under completed/no show tab as business exception

- a. Enc Status: encounter status
- b. Encounter Date: No Show(s) Date
- c. Department: inclusion department list

13. Bot will click Epic > Options > Send Letter

14. Bot will type patient's MRN and click Find Patient. Confirm the patient by using DOB. Once bot confirms patient, bot will click on Accept button.

15. If patient has an open letter encounter from past, this window will show up, Bot will click 'Create an Encounter' Tab

- a. If Bot is going back to process the patient after creating the letters encounter but failing to finish the letter, Bot will use the **Date, Provider, and department** information to go back into the same letters encounter (obtained by the BOT from the APPT desk, no show provider, no show department, and today's date)
- b. Bot will try up to 4 times to complete the same patient
- c. Bot will always go back to the initial letters encounter it created

16. If patient doesn't have a past open letter encounter, the below window will show up, Bot will write the NO SHOW provider name and NO-SHOW PROVIDER and click accept

17. If Bot lands on Patient Chart Advisories tab, BOT will click to the Letters tab

18. Bot presented with pop up box 1 of 3 only once due to November 2022 Epic Upgrade. Bot to click on NEXT button

19. Bot presented with pop up box 2 of 3 only once due to Upgrade. Bot to click on 'Next'.

20. Bot presented with pop up box 3 of 3 only once due to November 2022 Epic Upgrade. Bot click on "Let's Go to Work!" button

21. Bot click on 'New Patient Letter' – NOTE: after steps 18, 19 and 20 are completed once, this will be the screen to start in.

22. If Bot is unable to complete letter, click on the X and then Delete button.

23. Bot enter the letter number in the Choose letter field and press enter.

Record ID	Record Name
50799	CC NO SHOW WARNING LETTER
50801	CC NO SHOW WARNING LETTER (SPANISH)
50713	CC NO SHOW WARNING LETTER (NEPALI)
50715	CC NO SHOW WARNING LETTER (ARABIC)
50717	CC NO SHOW WARNING LETTER (VIETNSMESE)
50719	CC NO SHOW WARNING LETTER (RUSSIAN)
50721	CC NO SHOW WARNING LETTER (CHINESE)

24. Bot will complete the letters:

English:

*** - no show date

***** - Phone Number**

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart

Reschedule your appointment now by calling us at *** or visit www.mycarecompass.org/mychart

Spanish:

*** - no show date

***** - Phone Number**

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

He notado que faltó a su cita a nuestro consultorio el ***. Su salud y bienestar son importantes para mí. Entiendo que a veces pueden surgir problemas, pero lo/a animo a que haga todo lo posible por ir a sus citas programadas.

Le pediría que si no puede ir a su cita, llame al menos con 24 horas de antelación para que podamos cancelar su cita y usar ese horario para otro paciente. También puede cancelar su cita por MyChart

Reprograme su cita ahora llamándonos al *** o visite www.mycarecompass.org/mychart

ENGLISH TRANSLATION:

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart.

Reschedule your appointment now by calling us at *** or visit

www.mycarecompass.org/mychart

Nepali:

*** - no show date

*** - Phone Number

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

तपाईंले हाम्रो कार्यालयमा *** का लागि तय गरिएको अपोइन्टमेन्ट छुटाउनुभएको कुरा मै थाहा पाएँ । तपाईंको स्वास्थ्य र कल्याण मेरा लागि महत्वपूर्ण छन् । कहिलेकाहीँ त्यस्ता परिस्थिति आइपर्छन् भन्ने म बुझ्छु, तर म तपाईंलाई आफ्नो निर्धारित अपोइन्टमेन्टहरू नछुटाउन हर प्रयास गर्न प्रोत्साहित गर्दछु ।

यदि तपाईं आफ्नो अपोइन्टमेन्टमा उपस्थित हुन सक्नुहुन्न भने तपाईंले कम्तीमा 24 घण्टा पहिले कल गर्न म आग्रह गर्दछु ताकि हामी तपाईंको अपोइन्टमेन्ट रद्द गरेर उक्त समय अर्को बिरामीका लागि प्रयोग गर्न सक्ने छौं । तपाईंले MyChart मा गएर पनि आफ्नो अपोइन्टमेन्ट रद्द गर्न सक्नुहुन्छ ।

अब हामीलाई *** मा कल गरेर वा www.mycarecompass.org/mychart मा गएर आफ्नो अपोइन्टमेन्ट पुनः तय गर्नुहोस् ।

ENGLISH TRANSLATION:

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart.

Reschedule your appointment now by calling us at *** or visit

www.mycarecompass.org/mychart

Arabic:

*** - no show date

*** - Phone Number

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

لقد لاحظت أنك فاتك موعدك لدى ***. إن صحتك وعافيتك مهمتان بالنسبة لي. إنني أفهم أنه في مكتبنا في
تطراً أشياء، ولكنني أشجعك أن تبذل كل جهدك للحفاظ على مواعيدك المُجدولة. بعض الأحيان قد
أود أن اطلب إن لم تتمكن من موعدك أن تقوم بالاتصال على الأقل قبل 24 ساعة حتى نستطيع
الحضور في
إلغاء موعدك ولنقوم باستخدام هذا الوقت لمريض آخر. يُمكنك أيضاً إلغاء موعدك عبر MyChart .
فُرم بإعادة جدولة موعدك الآن عن طريق *** أو زيارة www.mycarecompass.org/mychart للاتصال على

ENGLISH TRANSLATION:

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart

Reschedule your appointment now by calling us at *** or visit

www.mycarecompass.org/mychart

Vietnamese:

*** - no show date

*** - Phone Number

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

Tôi nhận thấy rằng quý vị đã bỏ lỡ cuộc hẹn của quý vị tại văn phòng của chúng tôi vào ***. Sức khỏe thể chất và tinh thần của quý vị rất quan trọng đối với tôi.

Tôi hiểu rằng đôi khi tình huống bất ngờ có thể phát sinh, nhưng tôi khuyến khích quý vị cố gắng hết sức để đến những cuộc hẹn đã lên lịch của mình.

Tôi muốn yêu cầu rằng nếu quý vị không thể đến được cuộc hẹn của mình thì quý vị gọi đến thông báo trước ít nhất 24 giờ để chúng tôi có thể hủy cuộc hẹn của quý vị và sử dụng thời gian đó cho bệnh nhân khác. Quý vị cũng có thể hủy cuộc hẹn của mình qua MyChart.

Bây giờ, quý vị hãy lên lịch lại cuộc hẹn của mình bằng cách gọi cho chúng tôi vào *** hoặc truy cập www.mycarecompass.org/mychart

ENGLISH TRANSLATION:

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart

Reschedule your appointment now by calling us at *** or visit

www.mycarecompass.org/mychart

Russian:

*** - no show date

*** - Phone Number

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

Вы не явились на прием, который был назначен на ***. Ваше здоровье и благополучие важны для меня. Я понимаю, что иногда возникают непредвиденные обстоятельства, но я настоятельно прошу Вас приложить все усилия и не пропускать запланированные приемы.

Если Вы не можете прийти на прием, прошу Вас отменить запись, сообщив об этом по телефону предварительно как минимум за 24 часа, чтобы освободить это время для других пациентов. Вы также можете отменить прием на веб-странице MyChart

Чтобы перенести прием, позвоните по номеру *** или посетите веб-страницу www.mycarecompass.org/mychart

ENGLISH TRANSLATION:

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart.

Reschedule your appointment now by calling us at *** or visit

www.mycarecompass.org/mychart

Chinese:

*** - no show date

*** - Phone Number

- All locations for Kistler : 570-829-2621
- All locations for Hazleton: 570-459-9730

我注意到您错过了 *** 在我们诊所的约诊。您的健康和福祉对我来说很重要。我能理解有时会发生一些计划之外的事情，但我鼓励您尽力前往已排定的约诊。

如果您无法准时赴约，请提前至少 24 小时致电我们，以便我们取消您的约诊，将这个时间用于为其他患者服务。您也可以访问 MyChart 取消约诊。

您现在可以致电 *** 与我们联系，或访问 www.mycarecompass.org/mychart 重新排定约诊。

ENGLISH TRANSLATION:

I noticed that you missed your appointment at our office on ***.

Your health and wellbeing are important to me. I understand that sometimes things come up, but I encourage you to make every effort to keep your scheduled appointments.

I would ask that if you cannot make it to your appointment that you call at least 24 hours in advance so we can cancel your appointment and use that time for another patient. You may also cancel your appointment via MyChart

Reschedule your appointment now by calling us at *** or visit

www.mycarecompass.org/mychart

25. If *** are not completed in letter and 'print now' button is used, warning pop up will show. Bot click on 'Go Back' button and complete open *** areas in letter from above workflow

26. Bot to click on DETAILS at top right to open section **only once** to have this default as opened. This allows for the Reason for Letter and Letter Comment section to show.

Bot will type IAHNOSHOW in the Letter comments:

27. Bot will click on 'Print Now' button once letter is completed.

Screenshot of Communication Management after 'print now' button is used – FIRST TIME PRINTER SETUP. The first-time bot does this process, it will be presented with this screen to view information. Bot to click on X to exit from view of letter. **Then Bot to click on 'Select a printer' in the Printer Selection Required bot at the top right-hand corner of the screen.**

28. After bot clicks on 'select a printer', bot to choose the Microsoft Print to PDF option, then click on PRINT button. This is only needed to be done once for the setup.

29. **'Print Job Submitted' message will show in the top right hand-side of the screen. Message will go away quickly.**

30. Bot will save the letter PDF to a network folder by naming it: MM_DD_YYYY_MRN

Automated QA to double check if letters sent:

Bot will click in Review button once it lands back on the appointment desk

Bot will click on Letters tab

Bot will check to see if there is a letter from the same day with comments: IAHNOSHOW

- It will add a column to the output file
- Letter Sent: Confirmed / Not Confirmed

31. Bot will send all the PDFs to the print shops network folder to be printed and sent to patient's address.

32. Bot will go back to the scheduling reports, and click Message, types: **no show letter was sent TODAY's date**, and click ACCEPT. (Bot will not delete any other existing message in this BOX)

***Bot will click on message again > check to see if the message was added for all patients. If identifies any patients that had no message added, Bot will try 2 more times. If still failed, it will add it to the exception tab in the output file" No message added"**

33. Bot will click Remove > Magnifying Glass next to Remove Reason

34. Bot will pick "Unable to Contact Patient - Letter Sent"

35. Bot will click Accept

36. Bot will repeat the steps for the next pt. until there are no patients left

37. Bot will send an email to business with success, business and system exceptions

4.5 EXCEPTIONS IN THE PROCESS FLOW

Business Exception	Actions	Comment
Break the glass popup	Click cancel on pop up	Do not process this patient. Business will have to manually process this patient. Patient will show up in the Break the glass tab.
Patient Deceased	Dismiss popup and move on	Do not process this patient. Patient will show up in patient deceased tab
Patients have completed and no show from the same date	Bot will put this patient in the failed patient tab and not processed the patient. Bot will not create encounters for these patients. They will be manually handled.	Patient will show up in patient failed tab. Business will have to manually process this patient
Message Not added	If Bot fails to add a message from follow up report, it will mark it as business exception and provide the patient information in the output file	Patient will show up in no message add tab. Manual processing
Admitted Patients	If the patient is admitted the same day of the no show visit, the patient will be reported as business exception	Patient will show up in admitted tab. Manual processing
Unable to Print	If Bot fails to save the letter template, it will put it in the output file as 'unable to print' as business exception	Patient will show up in 'unable to print' tab for manual printing
Invalid Address	If the patient has ***update address*** in the address field bot will mark this patient as business exception	Patient will show up in 'invalid address' tab for manual processing
System Exception	Actions	Comment

BOT Failed (unknown reason)	Bot failed at some point and needs manual follow up. IAH will investigate the reason of failure and will plan on implementing a fix on a planned date.	Patient will show up in patient failed tab Business will have to manually process this patient
------------------------------------	--	---

4.6 SYSTEM ERRORS

Error	Action	Comment
Application crash	Recover and retry 3 times to try the same patient if no encounter created	
If Bot fails before creating a letter encounter	Recover and retry 3 times to try the same patient if no encounter created	
If Bot fails after creating a letter encounter	Bot will go back to the same letters encounter, delete the old open letter and try up to 4 times	

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
Epic Upgrades	- When the planned Epic upgrades take place, the IAH will pre-plan in alternate environment - Business will determine if the BOT should be paused, on the day of the go live	
When the system or application is down (i.e. EPIC)	Bot will start with the 10% of the volumes and expand to 30% - 50%-75%	

	then 100% when each population is stable - Automation implemented automated QA steps for confirming letters and confirming no show counts - Automation will manually audit all exceptions and success patients during hypercare	
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	Automation implemented automated QA steps for confirming letters and confirming no show counts	B.A. will alert the developer and technical analyst on the error. Bot will be paused until issue is identified if Bot is not functioning properly
Hypercare	- Bot will start with the 10% of the volumes and expand to 30% - 50%-75% then 100% when each population is stable - Automation implemented automated QA steps for confirming letters and confirming no show counts - Automation will manually audit all exceptions and success patients during hypercare	B.A. and QA will alert the developer and technical analyst on the error. Bot will be paused until issue is identified if Bot is not functioning properly. Business will process records if necessary.
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 fails to run the whole process, bot will stop and run the queues the next day.	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 [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.
If the bot enters/creates wrong information in patients charts?	If the bot enters or creates wrong information (not all inclusive list): • Sending duplicate letters • Not sending the letter when needed • Creating additional encounters • Sending wrong letter template • Categorizing patients wrong (success vs exceptions)	If the bot enters or creates wrong information, the IAH will report the instance to the stakeholders. The stakeholders will determine the next steps.
If the bot encounters higher than expected volumes?	If the bot encounters higher than expected volumes, IAH will determine if an additional bot will be assigned to keep up with the volumes	

5. Technical Details

Item	Description	Comment
Robot Type	Unattended	
Orchestrator used?	Yes	On-Premise/Version
UiPath version used	2019.10	

6. Reporting

Report Type	Update Frequency	Details	Distribution List
PDFs to Print shop's network folder	Daily	PDFs of patient letters to be mailed to addresses	Network folders
Daily List of patients	Daily	Subject: One email for Each – First Email: ○ Fam Prac CommunityCare Hazleton ○ Peds CommunityCare Hazleton Title: IAH- FQHC No Show Automation Daily Patient Reports MM_DD_YYYY _ Hazleton Second Email ○ Fam Prac CommunityCare Kistler ○ Peds CommunityCare Kistler Title: IAH- FQHC No Show Automation Daily Patient Reports MM_DD_YYYY _ Kistler Body of email: ● Patients in the No Show Report:	Email 1 - Fam Prac CommunityCare Kistler Peds CommunityCare Kistler i Email 2 - am Prac CommunityCare Hazleton Peds COmmunityCare Hazleton

		• Patients processed: total of success/business and system exceptions Please see the attached file. No show letters sent: Break the Glass records: Complete/No Show: Deceased Patients: Failed records: No Message Added: Patient Admitted: Unable to Print: Tab 1: List of patients received no show letters Name of TAB: "No Show letter_ recipients" No Show letters list: (MRN, Full Name, last No Show Appointment Dept, last No Show date, last No Show provider) Tab 3: List of patient's had Break The Glass Name of tab: "Break The Glass" Break The Glass list (to be manually processed): (MRN, Full Name, last No Show Appointment Dept,	
--	--	--	--

		last No Show date and time) Tab 4: List of patient's Comp/No Show Name of Tab: "Comp/No Show" list (to be manually processed): (MRN, Full Name, last No Show Appointment Dept, last No Show date and time) Tab 5: List of deceased patients Name of Tab: "Deceased Patients" Deceased patients (to be manually processed): (MRN, Full Name, last No Show Appointment Dept, last No Show date and time) Tab 6: List of failed patients Name of tab: "failed patients" list (to be manually processed): (MRN, Full Name, last No Show Appointment Dept, last No Show date and time) Tab 7: List of patients had no message added Name of tab: No Message added Bot will check to see if the message was added for all patients. If identifies any patients	
--	--	---	--

		that had no message added, Bot will try 2 more times. If still failed, it will add it to the exception tab in the output file, "No message added": (MRN, Full Name, last No Show Appointment Dept, last No Show date and time) Tab 8: List of patient's Admitted Name of Tab: "Admitted" : (MRN, Full Name, last No Show Appointment Dept, last No Show date and time) Tab 9: List of patients whose letters were not printed Name of tab: Unable to Print (MRN, Full Name, last No Show Appointment Dept, last No Show date, last No Show provider) Tab 10 – List of patients whose address are invalid Name of tab: invalid address (MRN, Full Name, last No Show Appointment Dept, last No Show date, last No Show provider)	
Bot Failed (didn't run at all)	Bot will run the report the next day for the same population (start date T-5 to end date T-4)	Subject: IAH- FQHC No Show Automation – Process Failed MM_DD_YYYY Body: Bot failed due to system error. Bot will run the same population on tomorrow's run.	

7. Environment Details

Application	Development Stage	Environment	Access Type	Access Key/Credential
Epic	Development	<Epic_SUP>	IAHNOSHOW and password	Username: <username> Password: <password>
	Prod	< Epic Prod >	IAHNOSHOW and password	Username: <username> Password: <password>
Outlook	Development/Test/UAT/Prod	<Environment Name>		
Network Folder	Test/Prod			\\geisinger.edu\dfs\0004\0610\610063

8. Assumptions

Assumption	Impact
Epic will be accessible	If Epic is down then robot cannot start

9. ADDITIONAL SOURCES OF PROCESS DOCUMENTATION

Type	Name	Link		Comments
No Show Policy	No Show Policy			
No Show Letter templates	Letter Templates	Record ID	Record Name	
		34977	CC NO SHOW WARNING LETTER	

		38513	CC NO SHOW WARNING LETTER (SPANISH)
		50713	CC NO SHOW WARNING LETTER (NEPALI)
		50715	CC NO SHOW WARNING LETTER (ARABIC)
		50717	CC NO SHOW WARNING LETTER (VIETNSMESE)
		50719	CC NO SHOW WARNING LETTER (RUSSIAN)
		50721	CC NO SHOW WARNING LETTER (CHINESE)

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