

Process Design Document / Solution Design Document

Process Name: Neuroscience Referral Automation

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	3/10/2023			Initial Draft
1.1	5/4/23			Business requested changes
1.2	7/13/23			Epic SU adjustments
1.3	8/1/23			Epic Upgrade adjustments
1.4	8/15/23			revise workflow due to post Epic Upgrade change
1.5	8/29/23			revise workflow due to post Epic Upgrade change
1.6	9/11/23			SU change update for precert pop up
1.7	9/14/23			Assign referral pop up steps
1.8	9/16/23			Epic Upgrade Oct 2023
1.9	10/19/23			Address Best Practice Advisory pop up
1.11	11/13/23			Restricted Referral and ROI steps
1.12	11/14/23			Added a step to address a new pop up in Epic during referral entry

1.13	9/23/24			Added steps to utilize a smartphrase for the body of the communication management referral request letter to Non-GHS PCP.
1.14	12/5/24			Added steps to address OurPractice advisory pop up for ped patients and referrals

REVIEW/APPROVAL

Role	Name	Date
SME		
Process Owner		
Business Architect		
IAH Director		
Developer		

STAKEHOLDERS

Role	Name	Email
Process Owner		
SME		
Business Architect		
IAH Director		
Developer		

2. Document Details

2.1 PURPOSE OF THIS DOCUMENT

The Process Design Document outlines the business process chosen for automation and the technology being utilized.

The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them with the details required for applying automation to the selected business process.

3. Current State Process Description

3.1 PROCESS SUMMARY

The purpose of this automation is to automate referral requests to the PCP when an insurance requires a referral, and no referral is on file.

PAR staff need to manually review reports (Receptionist report and or Unauth report) to identify patients who do not have a referral for their upcoming specialty appointment. Once identified, referral requests are sent to the PCP.

Pain Points: This process is a labor-intensive process and due to this, the reports are not run on a regular basis.

3.2 DATA FLOW & APPLICATIONS

3.2.1 INPUT

Input	Format	Location	Is it natively digital?	Is it structured?
Epic Referral Workqueue		Epic	Yes	Yes

3.2.2 OUTPUT

Output	Format	Location	Frequency	Comment
Status Report	Excel	Outlook email	Daily	

3.2.3 APPLICATIONS

Application	Version	Interface	Req Key / Operation / URL	Comment
Epic		Citrix	Test and Prod Bot Username	3/22/23
MS Excel		Desktop Application		Bot user will have VDI

3.3 BUSINESS RULES

Rule	Detail
Automation frequency	Daily
Bot start time	4 AM
Patient unique field	MRN
Excluding weekends and holidays	Yes, automation will run Monday – Friday only.
SLAs	EOD

3.4 CURRENT STATE METRICS

Avg. Daily Transactions	# Batches Daily	Avg. Volume / Batch	Weekly Avg. Volume	Frequency
238	1	238	1,667	Daily

3.5 CURRENT STATE PROCESS FLOW

High Level Process Flow (Current state):

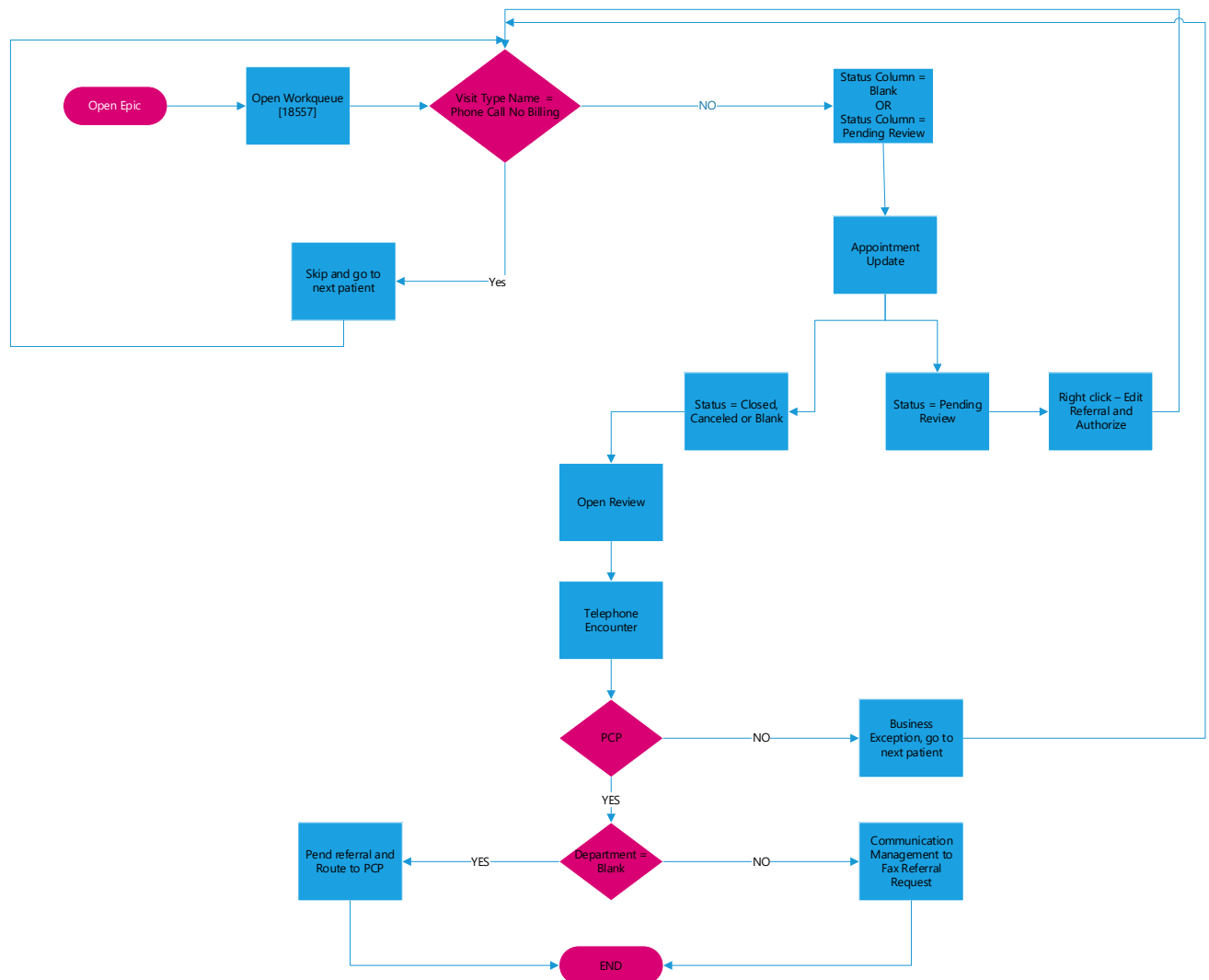
1. PAR staff for each clinic manually pulls reports daily to identify patients who do not have a referral for their upcoming specialty appointment.
2. Once identified, referral requests are sent to the PCP

- Geisinger PCP
 - Generate Epic telephone encounter
 - Pend appropriate referral
 - Route referral request to PCP
- Non-Geisinger PCP
 - Fax referral request

4. Future State Process Description

4.1 FUTURE STATE PROCESS FLOW

Bot Automation Process & Workflow Diagram (Future State):



1. Bot logs into Epic
2. BOT will go to referral workqueue
3. Bot will identify patients who do not have a referral for their upcoming specialty appointment
4. Once identified, Bot will send a referral request to the PCP on file (Initial request sent 14 days prior to DOS. If no referral order a 2nd request will be sent 5 days prior to the DOS and then daily until DOS)
 - Geisinger PCP
 - Generate Epic telephone encounter, use smart phrase for documentation purposes
 - Pend appropriate referral
 - Route referral request to PCP
 - Non-Geisinger PCP
 - Generate Epic telephone encounter, send communication management to PCP requesting referral using letter template

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	N/A	N/A	N/A

4.4 FUTURE STATE DETAILED STEPS

Step	Short description of key process steps	Screenshot for reference
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1.	Bot will log into Epic	
2.	Bot will click on User ID	
3.	Bot enter User ID and Press 'Tab'	
4.	Bot will enter Password	
5.	Bot will press 'Log in'	
6.	Bot will type department: Neurology D1 Danville [6112] Bot will click Continue	
7.	If Message of the Day appears, Bot will click OK	
8.	If this user agreement comes up, Bot will click OK	
9.	If 'What's New' video alert comes up, Bot will click 'Remind Me Later'	
10.	If ' Customize Your Home Activity ' pops up, Ignore it If ' Change Challenge Answers ' pops up, Ignore it If ' Work Better with Epic ' pops up, Ignore it	
11.	Bot will click on Workqueue List	
12.	If 'Workqueue List' is not on toolbar: Bot will click on Epic (top left)	
13.	Bot will enter 'Workqueue' in 'Search activities'	

14.	Bot will click on Workqueue List Toolbar	
15.	Workqueue list should default to Favs, Bot will double click to open report # 18557	
16.	If report is not listed under Favs: Bot will click on ' Patient ' and scroll down through list and search for 18557 GS MISSING REFERRAL NEUROSCIENCE.	
17.	Click on star, this adds report to your favorite list	
18.	Bot will click 'Favs'	
19.	Bot will double click to open report 18557 GS MISSING REFERRAL NEUROSCIENCE	
20.	1. Bot will sort work queue by Appointment Date. 2. Bot will identify appts that are > 14 days from the date of visit. 3. Bot will initiate referral capture workflow for these patients. 4. Bot will send 2nd referral request if/when referral is not linked to appointment, (5) days out from the date of visit. Bot will route encounter as high priority. 5. Bot will continue to send referral request (resend encounter as high priority) if/when referral is not linked to appointment every day until DOS. (Friday prior for Monday)	
21.	Bot will skip all patients with Visit Type = PHONE CALL NO BILLING	

22.	The bot will not work appointments when the Visit Coverage = Optum Veterans Affairs . The bot will send a Business Exception BE = Visit Coverage Optim Veterans Affairs	
23.	Bot will skip all appointments with Dept Specialty = -Psychology -Pediatric Psychology -Otolaryngology -Audiology -Addiction Medicine -Pediatric Psychiatry	
24.	Bot will only work Referral Status = Pending Review and Referral Status = Blank	
25.	Status = Pending Review Bot will click line item (patient/ referral info will populate on screen Bot will copy Appointment Date and then, Bot will click 'Appointment Update'	
26.	If Bot lands on 'Break-the-Glass' window, it will click 'Cancel' and move on to the next patient. *Break the glass patient will be reported as business exceptions	
27.	If the deceased patient pop-up opens, Bot will click 'OK' *Deceased patients will be reported as a business exception. Bot will exit the patient's encounter and start processing the next patient	
28.	If 'No Security' pop-up opens, Bot will click 'OK'	

	*No Security patients will be reported as a system exception * Bot will exit the patient's encounter and start processing the next patient	
29.	Click on Appt Desk	
30.	If bot lands on this screen, bot will click Appt Desk	
31.	Bot will click on Review	
32.	Bot will select Referrals Tab	
33.	Bot will click on Filters	
34.	Bot will apply the following filters: Referral Status = AUTH PEND	
35.	Bot will type 'Neuro' in the 'Specialty Referred to contains' field to filter only Neuroscience referral types	
36.	Example of filter results for 'specialty referred to contains'	
37.	Bot will right click on referrals in a PEND status and click 'show preview'	
38.	Bot will click on blue hyperlink Referral #	
39.	Bot will click on Status/ Magnifying Glass	
40.	Bot will select Authorized [1]	

41.	Click Accept	
42.	If the following 'Unable to accept' screen opens, Bot will select Go Back	
43.	Bot will land on 'Expiration Date' field	
44.	Bot will enter Y+1 into the 'Expiration Date' field	
45.	Bot will click Accept	
46.	If the following pops up: Referral Entry Unable to Accept 'Please complete the following fields: Pre-Cert # is required.' Bot will click Go Back This will be a business exception. Business Exception reason = Pre-Cert Required	
47.	Bot will click cancel	
48.	If bot gets the following 'potential duplicate referral found' screen, Bot will click 'Continue Anyway'	
49.	Bot will close chart review screen	
50.	Bot should be on Appt Desk	
51.	Bot will click Future tab	

52.	Bot will review future appointments and right click on Future Neuro appointment Appointment Date copied from step 24 = Encounter Date	
53.	Bot will select 'Assign Referral'	
54.	Review Appointment Information. If department = Neuro, right click on referral *List of referral types and department list in Teams shared folder, link below under Additional sources of process documentation	
55.	Bot will select Assign Referral	
56.	If Assign Warning pops up for referral and appointment do not match Bot will click 'Continue Assigning'	
57.	If your referral is not listed, check for filters, and remove	
58.	Bot will click on Filter	
59.	Bot will remove all checkmarks /filters	
60.	Now that filters have been removed, referral should list on appointment desk	
61.	Right click on referral and Click Assign Referral	
62.	Bot will close Referral Action screen	
63.	On Future tab, Green check mark will appear under Referral column after referral is assigned	

64.	Bot will copy CSN # for future appointment and add it to the QA Output file on the ROI Tab	
65.	Bot will copy Hospital Account # for future appointment and add to QA output file on the ROI Tab	
66.	Exit Appointment Desk And work next patient on workqueue	
67.	Status = Pending Review Bot will click line item (patient/ referral info will populate on screen If there is a Referral attached, Bot will click on blue hyperlink	
68.	Bot will click on Status/ Magnifying Glass	
69.	Bot will select Authorized [1]	
70.	Click Accept	
71.	If the following 'Unable to accept' screen opens, Bot will select Go Back	
72.	Bot will land on 'Expiration Date' field	
73.	Bot will enter Y+1 into the 'Expiration Date' field	
74.	Bot will click Accept	

75.	If the following pops up: Referral Entry Unable to Accept 'Please complete the following fields: Pre-Cert # is required.' Bot will click Go Back This will be a business exception. Business Exception reason = Pre-Cert Required	
76.	Bot will click cancel	
77.	If bot gets the following 'potential duplicate referral found' screen, Bot will click 'Continue Anyway'	
78.	Bot should land back on WQ. Referral is now in an Authorized Status Bot will work next patient on WQ	
79.	Status = Blank Bot will click line item (patient/ referral info will populate on screen *Bot will copy Appointment Date, and Visit Type	
80.	Click on Appointment Update	
81.	Click on Appt Desk	
82.	Find future scheduled appointment and copy Department and Provider Name/ID (will need at step 94 and 114)	
83.	Bot will click on Review	
84.	Bot will select Referrals Tab	

85.	Bot will click on Filters	
86.	Bot will apply the following filters: Referral Status = AUTH PEND *one or both of Status may not exist if referral was never ordered	
87.	Bot will type 'Neuro' in the 'Specialty Referred to contains" field to filter only Neuroscience referral types	
88.	If Neuro referral is listed in an AUTH status OR PEND status, do not send Telephone encounter to PCP	
89.	If unable to filter by Status and or Neuro Specialty = No Neuro referral ordered. Bot will send Telephone Encounter to PCP	
90.	Click on Tel Enc to create a telephone encounter Copy patient Name, DOB and MRN	
91.	Select patient under 'Currently Open' Confirm you have the correct patient by checking patient Name, DOB and MRN	
92.	If this screen opens, select 'Create an Encounter'	
93.	Date = defaults with today's date Provider = Bot will click on PCP	

94.	Department = will default with Geisinger PCP department. *Non-Geisinger PCP will not have a department*	
95.	If Department is equal to any of the departments listed below, Bot will mark it as a Business Exception - FAM PRAC COMMUNITYCARE HAZLETON - FAM PRAC COMMUNITYCARE KISTLER - FAM MED LEWISBURG BROOKPARK EMSO - FAM MED LEWISBURG WEST BRANCH EMSO - FAM MED MIDDLEBURG EMSO - FAM MED MIFFLINBURG EMSO - FAM MED MILTON EMSO - FAM MED NORTHUMBERLAND EMSO - FAM MED SELINGSGROVE EMSO - SVMS FAM PRAC Business Exception reason = Restricted Referral Department Bot will go to next patient	
96.	If department is blank, this indicates a non-Geisinger PCP. Enter department # from step 81.	
97.	Click Accept	
98.	*If PCP is greyed out, business exception, go to next patient Business exception reason = No PCP Bot will go to next patient on WQ	
99.	Click on Reason for Call	
100	Add a new reason: Enter 728	

101	Reason for Call: Referral Requested by Specialist [728]	
102	Add Comments: IAH Referral Request and click Close	
103	Navigate to Documentation /My Note section. If Documentation /My Note section is not visible on screen, Bot will click the following button to Open Sidebar	
104	If Geisinger PCP, Bot will enter the following: "Your patient has an upcoming neurology/ neurosurgery appointment. Their insurance requires an active referral be on file. Please sign pending referral order to ensure we comply with insurance requirements. Please do not reply to sender, this is an automated message. The mailbox is not monitored."	
105	If non-Geisinger PCP, Bot will enter: 'Patient with upcoming Neurology appointment. Referral order request sent to PCP.'	
106	Click Accept	
107	Click on Routing	
108	Click on PCP	
109	Example of PCP entered in Routing	

110	If PCP is not an option, SKIP to step 131	
111	Click on 'Add order'	
112	Enter Referral Order Example: Neurology Referral OP [EPIC197]	
113	Click on Referral Order and then Accept Example: NEUROLOGY REFERRAL OP	
114	if the Alternative Recommended screen opens, click Continue	
115	if the Ask-a-Doc Best Practice Advisory opens, bot will click Dismiss	
116	If the patient is under 18 years of age, and the OurPractice Advisory pops up, the bot will click Order and then Accept. (the adult referral will be replaced with the peds referral)	
117	If the Alternative Recommended alert fires, the bot will click Continue	
118	Bot will enter 'To Provider' Enter provider ID copied from future schedule (step 81)	
119	Select provider name and department copied from future schedule, copied from step 81	
120	If this pop up appears once a provider is selected the bot will enter '1' in the reason field: 'Patient Request'	
121	Bot will select 'What condition is the patient being referred for?' from the list.	

	Bot will select reason that matches Visit Type. Visit type copied from Step 81 If there is not a 1:1 match from visit type = Reason, leave blank (This example is Stroke)	
122	Bot will select Geisinger for: Where should this appointment be scheduled?	
123	Bot will Click Accept	
124	Bot will Click Pend	
125	Bot will Click Chart Review	
126	Bot will Click on Encounters	
127	Bot will verify Telephone encounter with today's date has been created. Description = Referral Requested by Specialist (IAH Referral Request)	
128	Bot will Click on 'Call Intake'	
129	Bot will Click on Routing	
130	Bot will Click Send and Close Workspace	
131	Bot should be back on Appt Desk	
132	Bot will click on Future tab	
133	Bot will copy CSN # for future Neuro appointment and add it to the QA Output file on the ROI Tab	

134	Bot will copy Hospital Account # for future Neuro appointment and add to QA output file on the ROI Tab	
135	Bot will Exit Appt Desk	
136	Bot will Close patient record	
137	When PCP is not an option to Route encounter – Bot will click Communication to request referral from non-Geisinger PCP	
138	Click on New Communication	
139	Click on PCP	
140	Click on magnifying glass under Choose Letter	
141	Select the following letter template: "AEC REFERRAL REQUEST BY SPECIALIST LETTER" Bot will click Accept	
142	Click on Details	
143	Click on Reason for letter, enter 17 (Patient Referral)	
144	Click on Letter Comment	
145	Enter "IAH Referral Request"	
146	The bot will delete the following sentence	

147	The bot will replace the sentence with the following smartphrase: .BOTREFERRALNONPCP	
148	Bot will enter department name under Thank you	
149	Click Send Now	
150	Letter sent confirmation page	
151	Click on Chart Review	
152	Click on Letters	
153	Bot will QA that a letter has been created for today's date Check comments "IAH Referral Request"	
154	If Letter does not exist, go back and process letter to request referral starting with Step 131	
155	Bot will Close encounter by selecting 'Sign Encounter'	
156	Bot should be back on Appt Desk	
157	Bot will click on Future tab	
158	Bot will copy CSN # for future Neuro appointment and add it to the QA Output file on the ROI Tab	
159	Bot will copy Hospital Account # for future Neuro appointment and add to QA output file on the ROI Tab	

160	Example of ROI tab on Output File	
161	Review QA log from previous day. (14) business day after DOS Bot will check appointment status (Copy patient MRN)	
162	Open Appointment Desk, bot will click on Appts	
163	Bot will click Past. Bot will look for the following Encounter Status = No Show; Can and Comp	
164	Encounter Status = No Show; Can and Comp Bot will verify Encounter Date and Department match Bot will copy Visit Type and add to QA file	
165	Example of QA file (Success tab)	
166	When all patients have been worked, Logout of Epic	
167	Close Epic Application	

4.5 EXCEPTIONS IN THE PROCESS FLOW

Exception	Actions	Comment
Patient Not Found	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Break-the-Glass	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Deceased	Flag in output file and continue to next Masterfile entry to process	Business to work manually

No PCP	Flag in output file and continue to next Masterfile entry to process	Business to work manually
No Security	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Pre-Cert Required	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Restricted Referral Department	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Optum Veterans Affaris Insurance	Flag in output file and continue to next Masterfile entry to process	Business to work manually

4.6 SYSTEM ERRORS

Error	Action	Comment
Application crash (Epic)	Recover and retry 3 times If unsuccessful bot will reprocess with next run	
Epic Downtime	Pause bot if during run time	
Epic Upgrade	Review with business and determine what/if any action is necessary	

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 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 Recovery
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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.

Scenario	Prevention	Detection	Recovery
Workqueue file format change or workqueue is blank (no data).	Business to notify IAH regarding upcoming changes. IAH and Business work together to prepare and follow change management process.	Bot finds out the unexpected file format and fails to complete the process.	- Bot sends notification email to those who are on the distribution list and IAH Prod support team. - Business and IAH work together prepare and follows change management process.
Bot not completing as outlined in PDD during Hypercare.	N/A: What was not known was not preventable.	Hypercare Phase: Daily auditing is performed and process logs are monitored.	IAH team adjusts bot design to improve business exceptions.
Bot not completing as outlined in PDD during QA / Production	N/A: What was not known was not preventable.	Will be reported by business	Bot may be paused until next steps are identified.
Higher than expected system exceptions.	N/A: What was not known was not preventable.	Insight Dashboards created during UAT for long term monitoring of volume and exception changes (increases or decreases).	- Alert/pulses identified and notifications sent to IAH Comm Support. - Business and IAH work together if additional phase is needed. - ServiceNOW incident reported and escalated as needed.
Output file errors (timing, format, info, reporting).	N/A: What was not known was not preventable.	Hypercare Phase: Daily auditing is performed and process logs are monitored. Insight Dashboards created during UAT for long term monitoring of volume and exception changes (increases or decreases).	- Business and IAH team adjusts bot design to identify output file errors. - Business and IAH work together if additional phase is needed.

Automated QA Bot.	Bot produces email/confirmation/notification of summary indicating input matches output file/data/action results.	Bot indicates in email either success or failure of input=output comparison.	IAH Support and/or business reviews and determines next steps.
Unknown reasons If the bot fails, how will it continue and resolve issue?	N/A: What was not known was not preventable.	Bot is unable to complete the automated process.	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.

5. Technical Details

Item	Description	Comment
Robot Type	Unattended	
Orchestrator used?	Yes	On-Premise Version
UiPath version used	2020.10.4	

6. Reporting

Report Type	Update Frequency	Details	Distribution List
Process Report	Daily	Report status of processed transactions via email: Attach Output File • Subject: IAH Neuroscience Referral Automation Daily Summary (example) mm/dd/yy • Body: Example- • Please see attached daily report. Tab 1: Business Exceptions = how many Tab 2: System Exceptions = how many Tab 3: Success = how many Tab 1 = Business Exception Add the following columns: A = MRN B = Patient Name C = Appointment Date D = Visit Type Name E = Department F = Dept Specialty G = Visit Coverage H = Referral # I = Referral Status J = Exception Reason Tab 2 = System Exception	

		Add the following columns: A = MRN B = Patient Name C = Appointment Date D = Visit Type Name E = Department F = Dept Specialty G = Visit Coverage H = Referral # I = Referral Status Tab 3 = Successful Add the following columns A = MRN B = Patient Name C = Appointment Date D = Visit Type Name E = Department F = Dept Specialty G = Visit Coverage H = Referral # I = Referral Status	
Error Logs	After 3 days	Report of process errors Subject: IAH Neuroscience Referral Automation Error mm/dd/yy Body: Bot failed due to system error. Please manually process today.	
QA Report Log		Report QA status of processed transactions via email: Attach Output File Subject: IAH Neuroscience Referral Automation Daily QA Summary mm/dd/yy	

		- Body: Please see attached daily QA report. - Tab 1: Successful = how many Add the following columns: A = MRN B = Name C = Appointment Date D = Visit Type name E = Department F = DOB G = Appointment Status H = CSN# I = Hospital Account #	
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7. Environment Details

Application	Development Stage	Environment	Access Type	Access Key/Credential
Epic	Development	<Epic_Dev>	Username And Log in dept	Username: IAHNEUROREF Login Department:
	Test	<Epic_Test>	Username And Log in dept	Username: IAHNEUROREF Login Department:
	Prod	<Epic_Prod>	Username And Log in dept	Username: IAHNEUROREF Login Department:

Outlook	Development /Test/UAT/Prod	<Environment Name>	Email account	Email: TBD@geisinger.edu
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8. Assumptions

Assumption	Impact
The entire process is automated end to end with no manual intervention.	
The distribution list, email addresses, and/or shared mailbox listed in the PDD for the purpose of process notification through email are to be maintained solely by the line of business.	

9. ADDITIONAL SOURCES OF PROCESS DOCUMENTATION

Type	Name	Link	Comments
Assessment			IAH Teams Folder
Step Recording (video)			IAH Teams Folder
Task Capture			IAH Teams Folder
UAT Recording (video)			IAH Teams Folder
Executive Summary			IAH Teams Folder
Dept List		neuroscience Referral Automation Department List.xlsx	IAH Teams Folder

Referral Type List		Referral Types _ Neuro Referral Automation.xlsx	IAH Teams Folder
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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
MRN	Medical Record Number
IAH	Intelligent Automation Hub
SLA	Service Level Agreement