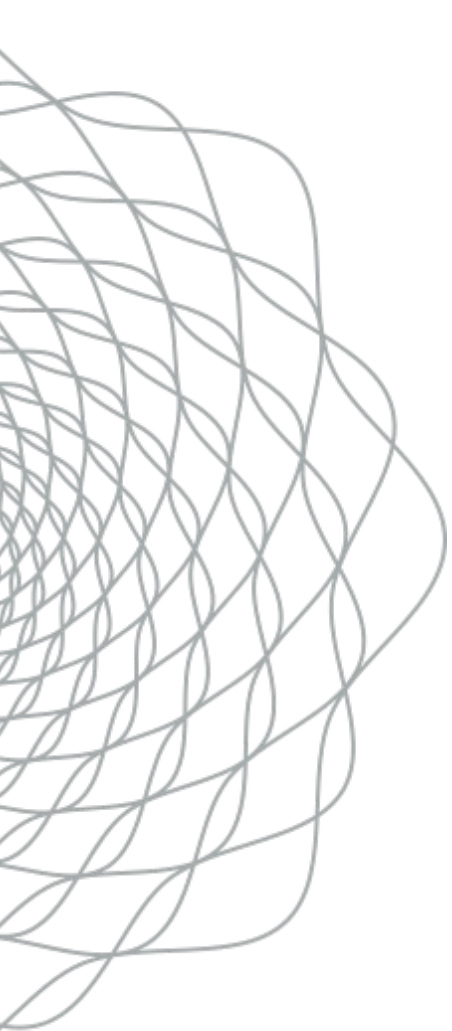




TARPON
HEALTH

a healthcare automation community

Community Update

January 2025

Agenda

1. New members
2. Assets, certifications, build programs
3. Quarterly consultations
4. Events
5. Onsite
6. Next Steps - your help needed!

Welcome to our newest members!



Geisinger



NORTHSIDE HOSPITAL

Northside is a managed service arrangement only, and therefore does not have any community members at this time.

Clinical assets

You may have noticed some new automation library entries

Tarpon and Geisinger have entered into a partnership!

The community now has access to 150+ automation use-cases and designs; many of which are in the clinical space.

Phase 1 (by end of Q1):

- Tarpon is reviewing all the automations and designs and will be loading them into the Automation Library

Phase 2 (Q2-Q3):

- Tarpon plans on creating a clinical 'bundles' for our members to get started in the clinical space

Example Automations

Chart Auditing

Clinical chart auditing automation.

- Suicide watch
- Violent + Non-violent restraints
- Weight watch

Abnormal result communication

Automation based on PA Act 112.

- Requires providers to notify the patient when a imaging service provider determines a significant abnormality

Level-up with our certifications and programs



Program	Length	Description	What you get
Solution Architecture Certification, Level 1	8-10 weeks	This certification is focused on training individuals on how to design automation using Tarpon's approach and tools.	A fully designed automation ready for build.
Solution Architecture Certification, Level 2	8-10 weeks	This certification is focused on training individuals on APIs and SQL to build the most stable and efficient automation solutions.	Skills to build with APIs and SQL.
Program Management Certification, Level 1 * Class FULL	8-10 weeks	This certification is focused on building an automation roadmap.	An automation roadmap that includes the number of automation projects to be undertaken, the necessary staffing requirements, and a budget covering personnel, technology, and services.
Program Management Certification, Level 2	Coming in Q3, 2025!		
Claim Status Build	12-16 weeks	This program is focused on building a claim status automation in a group format, leveraging Tarpon's design, code, and tools.	A functional claim status automation for at least one payer website.

Claim Status is our first 'Featured Automation'



Tarpon will be building 2 additional Featured Automations this year.

What is a Featured Automation?

A Featured Automation is a shared, fully designed, and coded solution—a complete “blueprint.” With this resource, community members can develop automations with speed and efficiency that would be difficult to achieve independently. Additionally, the Tarpon team can collaborate with your team, customizing the design and code to align seamlessly with your organization’s unique workflows.

On Deck in 2025:

- Optical Character Recognition workflow
- Authorization Determination / Status
- **Help us select the next automation!**

	
Claim Status	
A comprehensive guide to building claim status automation	
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Why Claim Status?	2
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Isolate data from the EMR	4
Create the Automation Queue	5
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Build additional filters and parameters for the automation	5
Use status results from previous runs to re-run and defer accounts	6
Status Claims	6
Determine API vs. RPA	6
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Scrape data for operations	7
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Join Us!



We are looking for participants for our Solution Architecture, Level 1 and Claim Status Build Program. More information on all the programs [here](#).

Program	Start Date	Participants
Solution Architecture Certification, Level 1	February	Methodist, Henry Ford Health, New Member(s)
Solution Architecture Certification, Level 2	July	?
Program Management Certification, Level 1	January	* Class FULL CU medicine, U of Washington, U of Utah, Bronson
Program Management Certification, Level 2	July	
Claim Status Build Program	February	U of Washington, Bronson, Henry Ford Health

Quarterly Consultations and Scorecards

We are an extension of your team!

What you get:

- Quarterly consultations on automation program best practices
- Benchmark your program over-time and against the community
- Tailored recommendations
- Themes across the community

Bottom line: Your program gets better every quarter.

Tarpon Health Scorecard Results							
Phase	Focus Area	Program A	Program B	Program C	Program D	Program E	Program F
Governance	Formalized Governance	2	2	2	3	3	1
	Executive Leadership	1	3	3	3	3	2
	Key functions	2	2	3	3	3	2
	Program Charter	0	2	0	2	2	1
	Automation Roadmap	0	2	2	3	2	2
	Hierarchy, Approvals	2	3	2	3	3	2
	KPIs	1	3	1	2	3	1
	Service Level Agreements	0	0	0	0	2	1
	Policies and Procedures	0	3	0	1	2	2
Identify	Culture		3	0	2	3	1
	Automation Use Case Generation	1	3	2			1
	Return on Investment	2	3	2			1
	Technology decision framework	1	2	2			3
Design	Prioritization	0		2			
	Shadowing and current state process mapping			3	2		2
	Future state process mapping			2	3		2
	Isolating the target population			1	2		
	Automation design details			2	2		1
	Process definition document (PDD)			2	0		2
	Process improvement			3	1		1

Themes from our first set of consultations

Here is just one of several themes from our first quarterly consultations. All data available [here](#).

Area	Themes	Why it matters
Governance	Most automation programs in the community are not utilizing team charters and automation roadmaps, which are important tools for formalizing goals, expectations, and program value.	Team charters help programs define their scope, responsibilities, and goals, providing a reference to keep teams focused when pulled in multiple directions. Often times, the exercise of creating the team charter helps identify areas of ambiguity surrounding the program that can be addressed and formalized through the charter. The Automation Roadmap complements the charter by defining the specific automation goals of the program, focusing on the number of automations and their projected value to the organization. Leading organizations use the roadmap both for planning (e.g., if automations need to go live in October, they must be fully designed by September) and for comparing the program's anticipated value to its actual impact.

New event structure

2025 will have 3 different types of events - all prescheduled!

Member Spotlight (New)

- A monthly session where one member shares major successes, challenges, and technology updates from their automation program.

Automation Exchange (formerly User Groups)

- A collaborative session focused on "in-progress" automation solutions. Two members will present their designs and challenges each month, with the group working together to create the best solutions.

Technology Forum (formery Webinars)

- Tarpon will periodically present updates on automation technology and solutions throughout the year.



Action Required:

Please let us know if there are any challenges, conflicts, or would like to change dates! The 2025 calendar of events and presentation schedule is available [here](#).



Annual onsite

Please hold September 15th through the 17th.

Event Details (**subject to change**):

Dates: 9/15 - 9/17

- Start Monday at 3:00
- Finish Wednesday at 12:00 (with lunch)

Who: Tarpon point of contact

Location: TBD

Hotel: TBD

How we are making it better:

- 3 days / 2 nights
- More active problem solving

Homework

Please

1. Review our event calendar, and let me know if any changes are needed
2. Complete our 2025 survey - [here](#)
3. Update the Automation Library and add your design documents
 - a. Include automations you have sunset or stopped pursuing!