



Tarpon Health Automation Lifecycle

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LEADERS FORUM

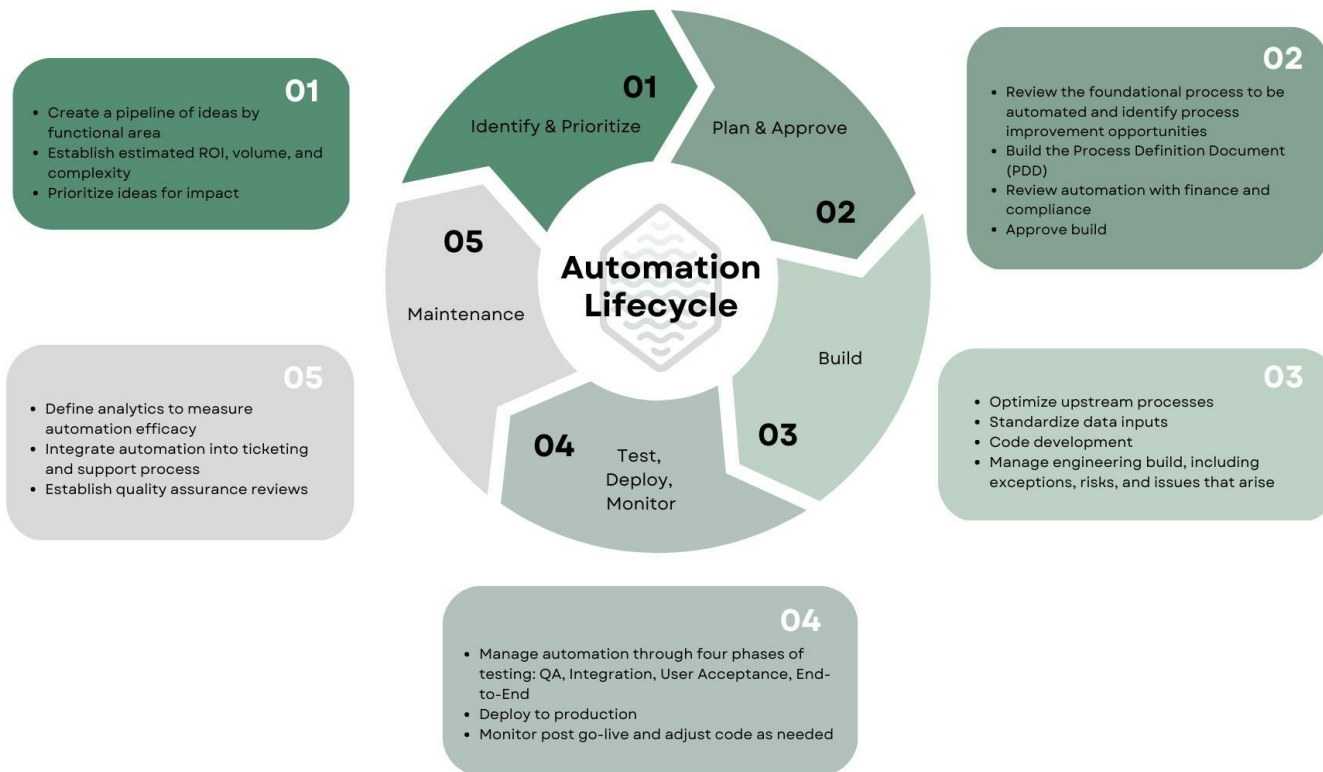
+ **Fitzroy** Health

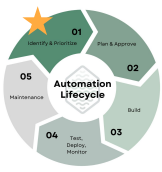


Agenda

- Lifecycle overview
- Phase by phase discussion
- Feedback

The Tarpon Health Automation Lifecycle

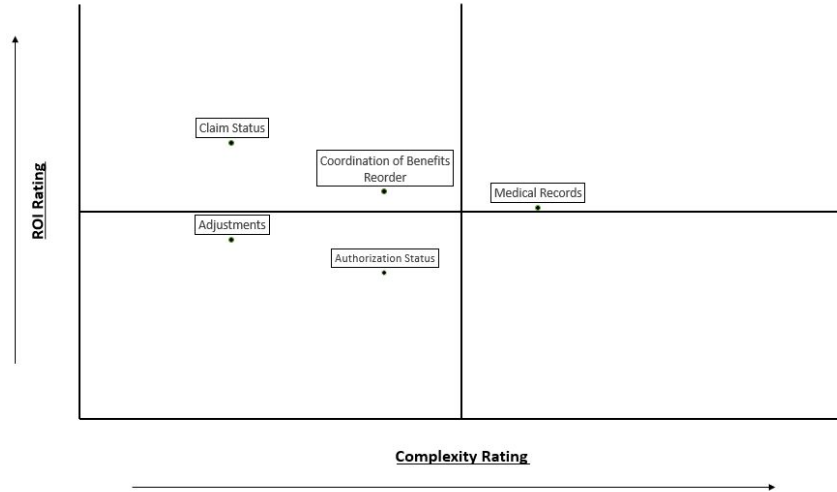


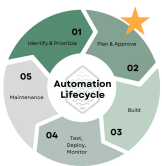


Identify and Prioritize

Key Activities	Rationale
Create a pipeline of ideas by functional area (In development: Tarpon Library)	Establishing a reserve of viable candidates allows organizations to maximize their program's resources.
Establish estimated ROI, volume, and complexity	Three main components necessary for prioritization: • ROI: 1 and 3 year models • Volume: operational impact • Complexity: scoring based on development needs
Prioritize idea for impact	Organizations should focus their efforts for impact on their unique goals. Financially sound automations will support funding the program and the organization as a whole.

Identify + Prioritize Toolkits

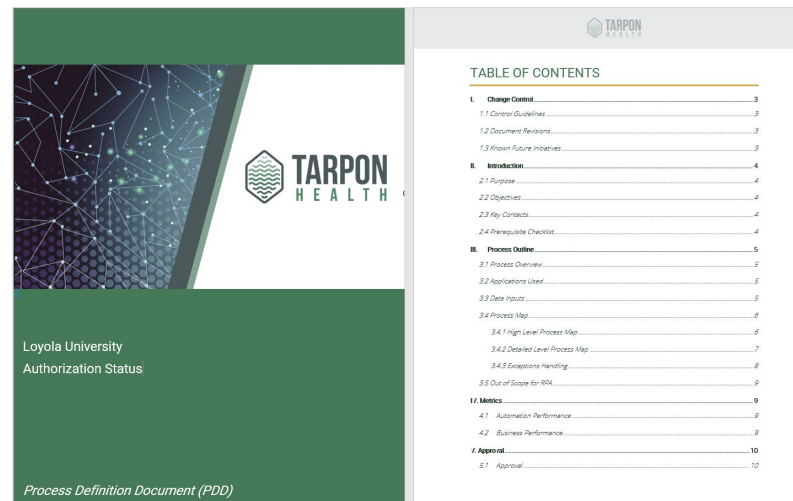


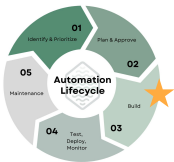


Plan and Approve



Key Activities	Rationale
Review foundational processes and identify process improvement opportunities	Any reduction in computing on the automation side is an efficiency improvement.
Build the Process Definition Document (PDD)	Provides a consolidated document to review all organizational and development initiatives.
Review automation with finance and compliance	All stakeholders should agree on estimated ROI and within all security and compliance rules.
Approve build	Use PDD as approval document to initiate build phase.





Build

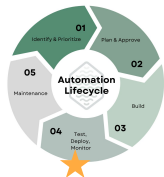
Key Activities	Rationale
Optimize upstream processes	Automations can exacerbate known issues due to increased speed and volume (e.g. an adjustment automation uses an incorrect transaction code).
Standardize data inputs	Limiting the amount of decisions an automation has to make will increase its efficacy in the long run.
Code development	Ensure best practices are utilized for high quality development (e.g. RE framework, selectors, try catches, etc.).
Manage engineering build, including exceptions, risks, and issues that arise	Strong processes in handling risks/issues during the build phase will decrease development time.

Oxford General Automation Dashboard

Weekly as of 02/10/2023

Health	Weekly Progress
	- PDD approved by process owners and reviewed by engineering lead - Engineers have built the build phases into Jira and will start build at the next sprint

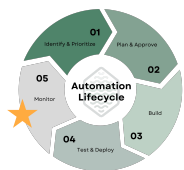
Risk management	
Risk	Action Plan
United Healthcare portal requires multi-factor authentication, extending development timelines	Engineering lead is evaluating the possibility of using 'dialpad' to satisfy MFA requirements
United Healthcare portal decreases processing speeds between 1:00 - 3:00 pm due to high volume	Engineering lead is working with process owner to the optimal times for the automations that would be outside of these hours



Test, Deploy, Monitor

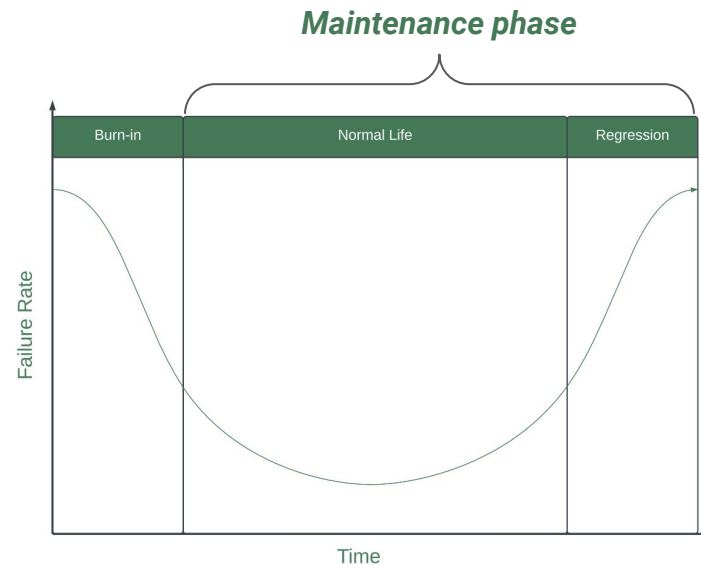
Key Activities	Rationale
Manage automation through four phases of testing: QA, Integration, User Acceptance, End-to-End	Testing builds confidence and understanding for all stakeholders. Segmenting test phases into four distinct areas allows for focused exception handling improvements.
Approve and go live	Prescriptive accountability ensures that the automation is built effectively before being deployed.
Monitor for two weeks post go live	The first two weeks are “burn-in” weeks where failures are more likely.

Automation Testing Plan			
Feature	Expected Action / Result	Pass/Fail (P/F)	Describe Failure
1.0	Test automations ability to navigate to the appropriate web page		
	Test automations ability to navigate to the appropriate web page		
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	Test automations ability to navigate to the appropriate web page		
	Test automations ability to navigate to the appropriate web page		
1.1	Test automations ability to log-into the payer portal		
	Test automations ability to log-into the payer portal		
	Test automations ability to log-into the payer portal		
	Test automations ability to log-into the payer portal		
	Test automations ability to log-into the payer portal		
1.2	Test automations ability to navigate to the 'search claim' web page		
	Test automations ability to navigate to the 'search claim' web page		
	Test automations ability to navigate to the 'search claim' web page		
	Test automations ability to navigate to the 'search claim' web page		
	Test automations ability to navigate to the 'search claim' web page		
1.3	Test automations ability to enter demographic information to find claim		
	Test automations ability to enter demographic information to find claim		
	Test automations ability to enter demographic information to find claim		
	Test automations ability to enter demographic information to find claim		
	Test automations ability to enter demographic information to find claim		



Maintenance

Key Activities	Rationale
Define analytics to measure automation efficacy	Governance teams should be aware of how well the automation is running so resources can be allocated appropriately
Integrate automation into ticketing and support process	Clear processes, training, and troubleshooting guides will allow IT teams to troubleshoot automations with less input from developers
Establish quality assurance reviews	Routine code reviews and aligning with known upgrades will ensure the automation runs smoothly



Tell us how we did



1 - Least valuable

10 - Most valuable

We value your feedback!



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