



Tarpon Health Automation Complexity

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LEADERS FORUM



Fitzroy Health



Agenda

- Toolkit overview
- Complexity factor poll and discussion
- Common challenges

Today's Goals:

- To educate the Community on the complexity scoring methodology of the Identify Toolkit
- Outline approaches to solving common problems

Identify Toolkit - measuring complexity

Identify Toolkit

Tools	Goal
Identify Toolkit Access here	Identify Toolkit: Capture volume, <u>complexity</u> , and ROI for go-no-go decisions.

Let's dive into the
Complexity scoring
methodology

Item	Client RPA	Weighted	Score	Preferred
Number of applications/portals:		30%	0%	1
Number of screens:		10%	0%	5
Number of decisions:		35%	0%	5
Number of clicks:		5%	0%	15
Number of outputs:		10%	0%	8
Number of screen scraped details: (If applicable)		10%	0%	5
Overall Rating:	0	100%	0%	39

Let's take a survey

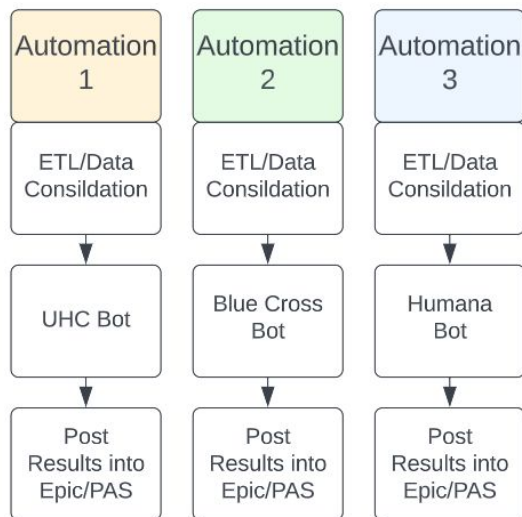
Please force rank complexity factors and let us know what factors we are missing.

Complexity Factor	Description	Example
Number of applications / portals	The number of applications utilized in a process.	For example: Patient account system, billing editor/scrubber, web page, scheduling tool, etc.
Number of screens	The number of distinct windows/screens that require information, actions, decisions.	For example (coordination of benefits): Search account, Insurance Tab RTE, Liability Buckets, Reorder Function, Notate Account.
Number of decisions	The number of variations that require a distinct action.	For example (coordination of benefits): If already re-ordered = skip, if no eligible secondary available = send patient letter, if no secondary exists = send patient letter.
Number of clicks	The number of actions that an automation needs to click, alter, or influence.	For example: click search, download, submit, adjust, etc.
Number of outputs	The number of potential outcomes from the automation.	For example (claim status): pending, paid, denied, void, accepted, etc.
Number of screen scraped details	The number of additional details to be screen scraped and stored.	For example (claim status): CARC code, error messages, etc.

Taking a modular approach

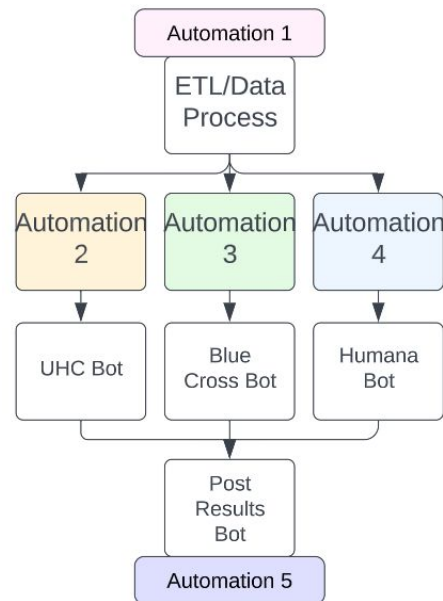
What factors go into pursuing a modular approach?

Non-modular example



Versus

Modular example



Multi-factor authentication

What approaches do you use to address multi-factor authentication? How do you choose an approach?

Phone

Designate a phone number through dialer technology

How it works:

- A [dial pad](#) application serves as a phone to receive authentication codes via text message
- Automation will launch the dial pad application and scrape the code
- Code will be entered into MFA requirement screen

Email

Designate an inbox to your automation

How it works:

- A designated inbox will receive authentication codes via email
- Automation will open the email and scrape the code from the message
- Code will be entered into the MFA requirement screen

Bypassing MFA via a service account is preferred whenever possible. Note: may not be possible for external applications.

Tell us how we did



1 - Least valuable

10 - Most valuable

We value your feedback!



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