



Automation Use Case Generation

Agenda

- Features of a good automation
- Approaches to gathering ideas
- Messaging

Today's goals:

- Prepare members to identify automation use cases within their organizations

Follow your business needs



You know your business better than anyone.

Area	Why
Key performance indicators	Trends or variances from industry benchmarks are an easy way to start looking for inefficiencies within your operation. Applying automation can either help directly or give staff bandwidth to address these areas.
Backlogged accounts	Backlogged accounts are a symptom of work overload or an increase in volume that is beyond the efficiency of an organization. Often this is a revenue opportunity because it means accounts are tied up and cannot be processed.
Outsourced labor	Organizations will outsource tasks if they know it is beyond the staffing capacity or beyond their skill set. There is typically a case for automation if it can augment the process being outsourced.
Manual data transfer	High volume processes that involve manually exchanging data between two disparate systems is RPAs bread and butter.
Software feature gaps	Manual workarounds with some of your large software systems can addressed through RPA.

What to look for

The process should have these features (with few exceptions) to be considered for RPA.

Feature	What we mean	Disqualifying scenarios
Manual, but digital	Focus on areas where staff are involved with digital technology. In order for automation software to work, the process must be in a software product, on the web, or digitized.	A payer only allows authorization statuses to be obtained via phone calls (common with complex or high cost procedures).
High volume and repeatability	Automation software should be designed for processes with high volume. Target processes that are done over and over again. When hundreds of variables are involved in any one decision, it can be hard for developers to formulate an exhaustive set of rules.	Claims statusing for auto-insurance claims likely doesn't have enough volume to justify building an automation.
Minimal constraints	Constraints are exceptions within the process that can't be solved strictly with a business rule (e.g if, then statement). Automations with too many constraints are prone to breaking because additional 'branches' or 'workarounds' must be built.	CAPTCHA are used to block automations from accessing websites. Volume and time restrictions may apply to various software systems.
Minimal outcomes	Automations should be built to resolve one specific process, not an endless amount.	Credits can have multiple outcomes: issue refund via check, issue refund via credit card, void claim, etc. One automation should not be pursued to cover all outcomes at once.

Additional valuable features

What other features have been useful when identifying automations?

Processes prone to human error

Examples:

Updating claim demographic data, such as subscriber ID and/or patient name.

Pulling an authorization number from a website and entering into a referral.

Calculations

Example:

Determining overpayment or underpayment by calculating expected reimbursement.
(Adjustments)

Determining historical adjudication trends, per payor, to avoid timely filing denials.
(Claim/Appeal submission)

?

For Discussion:

What other features are useful when identifying automations?

Two approaches

Once organization's have educated their staff they can start developing the muscle of gathering ideas.



Top down

Study organizational data and trends



Bottom up

Surface ideas from end users

Top Down

Use data at your organization to find strong use cases

Tactics
Benchmarking key performance indicators Example: Initial denials and write-offs by payer, service and location
Trends and Volume (or anticipated volume) Example: Sharp increases or backlogged workqueues
Known changes Example: A known policy update or application migration may cause more work for your staff

Discussion: How can organizations use these tactics to produce ideas?

1. Use a performance excellence team to identify root-causes
2. Look for mismatches between rising volumes and capacity
3. What vendor information can be monitored?

Bottom up

Use the biggest asset of your organization, your people

Tactics
Incorporate into meetings Example: Carve out time with recurring meetings to surface and document automation use cases
Ticketing software or online form Example: An intake form with features will allow the team to qualify submitted ideas
Dedicated inbox Example: Creation of dedicated email address or virtual drop box to handle idea submissions

Discussion:

What incentives can be put into place to drive overall awareness and idea generation?

Questions you can ask

Asking yourself and team some simple questions might be all you need.

Questions:

1. Which areas are underperforming?
2. Are there repetitive tasks that employees dislike?
3. Which applications or information silos are creating bottlenecks?
4. What processes can't be scaled unless you hire more people?
5. Do you have highly paid knowledge workers dedicated to time-consuming administrative tasks?
6. Are human data-entry errors creating frequent rework or exception handling?
7. Is your company considering outsourcing processes that you would prefer to keep in-house?

Messaging

Framing automation as a benefit to your organization and staff

Messaging	Key points
Top of license	• Mundane and repetitive tasks can be soul-crushing, automation will increase quality of life • Teams can focus on processes that are more cognitively rewarding
New skills	• Everyone will benefit from learning technical skills as this is where the industry is heading • Automation platforms are catering to 'citizen development' which may open the door for career growth
Productivity	• As automation takes on simpler tasks, we will be adjusting volume expectations because the complexity of each account will increase

Discussion: What hasn't worked well and what should be avoided?

Tell us how we did



1 - Least valuable

10 - Most valuable

We value your feedback!



TARPON
H E A L T H

Benjamin Reigle | benjamin@tarpon.health

James Stanford | james@tarpon.health