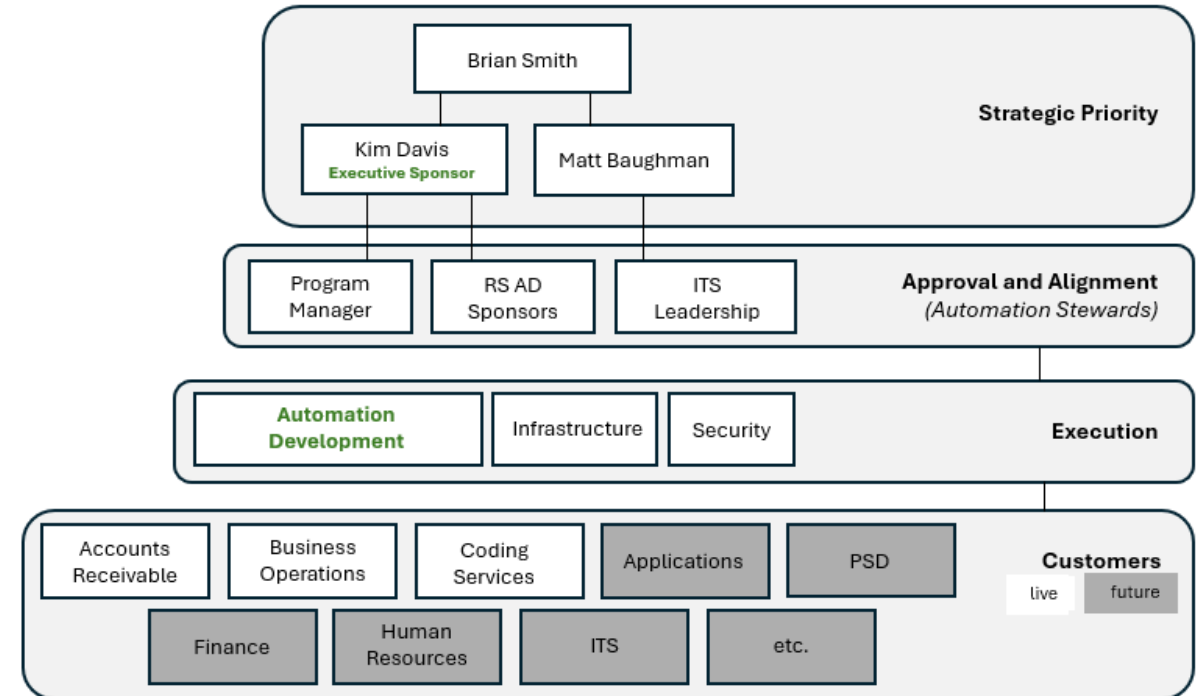


CU Medicine RPA Program



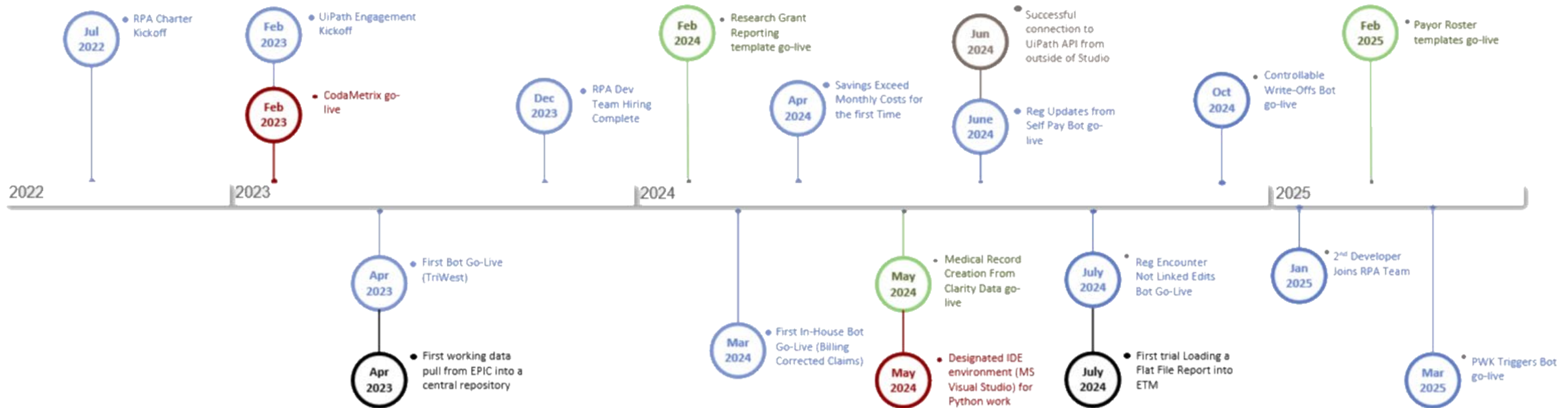
Overview of our Automation Program

- RPA was identified as a key initiative for Revenue Services for FY2023
- We went live on the UiPath platform in February 2023
- While our affiliate hospitals exclusively utilize Epic, our core system is **AthenaIDX**
- The program lives under Revenue Services > Operational Analytics & Automation Department
- Program Manager – Jen Snyder (Assoc. Director, OAD)
RPA Developers – Justin Cole, Daisy Galvan
Sr. Automation Analyst – Harper Bush



Revenue Services Intelligent Automation Timeline

Roadmap to Automation - Milestones and Big Wins



Major Successes & Impact

- We currently have 7 bots in production, 2 in development, 1 approved for development, and 2 greenlit for RPA.
- Since January 2024, our bots have saved ~9k hours of would-be manual effort. That translates to about 4 FTEs.
- Not included in these numbers is the impact from working with departments to review their processes and provide non-RPA solutions (scripts or queries), duplicated efforts, or obsolete work.

Successful Transactions

335.67K

Rerouted

50.39K

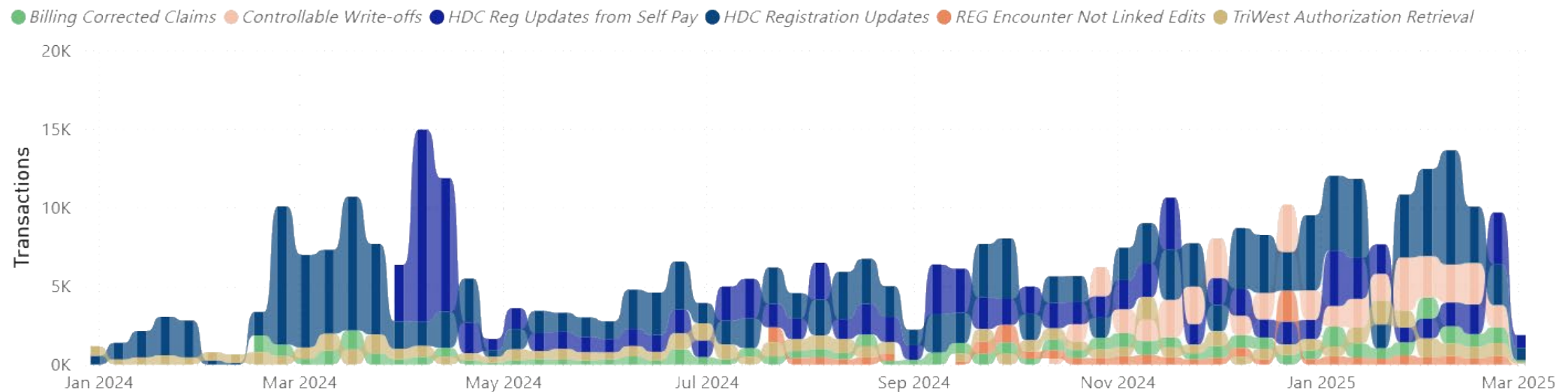
Failed/Manual

16.36K

Hours Saved - Includes
Rerouted

8.99K

Number of Transactions Handled per Week



Major Successes & Impact

- There are several bots which have made a notable impact at CU Medicine: The HDC-Related bots, and the Controllable Write-offs bot.
- Our 2 HDC Bots were the first to handle huge volumes and allowed us to avoid throwing additional FTEs at the growing volume. We have also been able to expand and adjust elements of these bots in response to changes from the hospitals:
 - The **HDC Registration Updates** bot obtains a list of visits linked to HDC invoices from a Status Discrepancy report. These are sitting in Pending and have been approved or denied by UCH. For each of those visits, the bot replaces the Pending plan with either HDC Approved or Self Pay No Insurance. Next, the bot Flips the Invoice FSC to match.
 - The **HDC Registration Updates from Self Pay** bot obtains a list of visits linked to HDC invoices which have been denied/are sitting in Self Pay. For each of the invoices, the bot Flips the FSC to HDC Pending in IDX.
- Controllable Write-offs was the first bot that used a free text field as input. This opened new possibilities in customizing bot instructions within our existing queue structure. We have also been able to expand to 15 additional input sources for this bot as the ARR department found areas of need.
 - The **Controllable Write-offs** bot gathers ETM Notes and parses WO Codes and Message Codes from the free text, then appends the other input sources. Next, using the parsed or rule-based information, the bot navigates to the line item(s) and performs the required write offs.

Challenges & Lessons Learned

- **What are the biggest roadblocks you faced (technical, operational, cultural)?**
 - **Trusting** the bot to do the work
 - The bot is **not** replacing people
 - In the beginning, getting automation ideas
 - Data siloes – some of our processes are dependent on Clarity data from our hospital partners' Epic environments, requiring concerted processes to bring that data in-house first
 - No view into nightly AthenaDX processes, resulting in excessive amount of daily downtime hours
- **Any lessons learned that might help other organizations on their automation journey?**
 - Discovery - Prioritizing automations by collaborating with other departments
 - The importance of accounting for all possible variations in a bot's workflow (upstream and downstream implications)
 - During the Discovery phase, make sure to check cross-departmentally for adjacent automation opportunities. There may be opportunity to broaden use case volume by identifying similar-looking workflows up front and implementing consistency between departments or building in appropriate decision points to account for these



Technology & Future Plans

- **What new tools, platforms/features, or updates are you exploring?**
 - Document Understanding
 - Cloud-based data lakes to more seamlessly incorporate data from 3rd party sources (i.e. Clarity)
 - *the vendor we're exploring offers a UiPath connector, which is very exciting from an integration standpoint
 - Sourcing bot queues via API
 - Hybrid-solution processes (i.e. a Python script that invokes an RPA component, and then uses the resulting bot output / retrieved report to complete the task at hand)
 - Establishing a Testing suite – creating UI/script-based programs to retrieve valid test cases to feed into the bot's queue
- **What are the upcoming automations or expansions in your pipeline?**
 - Medical Records – End-to-end solution
 - Leveraging API-sourced data from 3rd party systems to initiate bot workflows
- **How do you see your automation strategy evolving over the next year?**
 - Creating a true, organizational COE
 - Scaling automation initiatives beyond Revenue Services (i.e. HR, Finance, ITS)