



Solution Architecture

Part 2

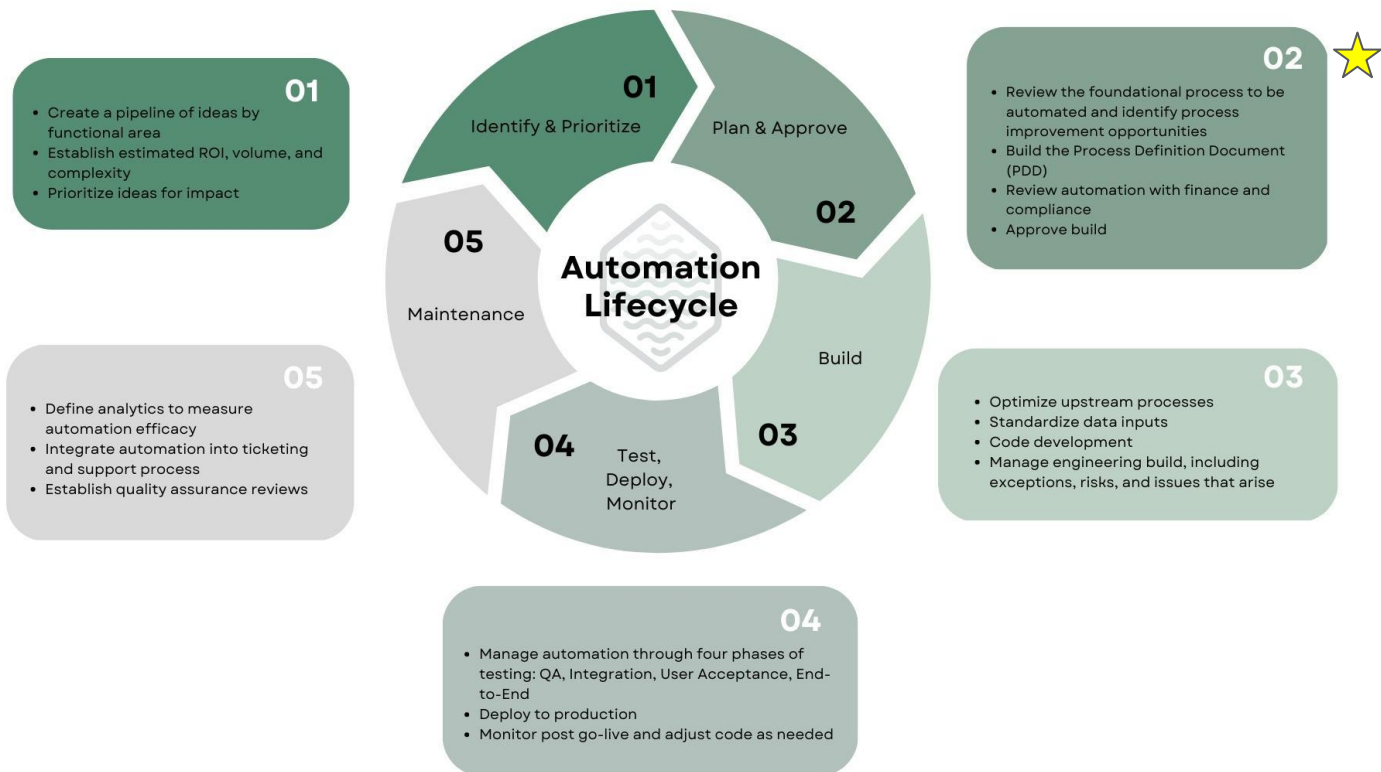
Agenda

- Introduction
- Four phases of planning
- Plan toolkit review

Today's goals:

- Train members on the Plan toolkit

The Tarpon Health Automation Lifecycle



Getting ready for development

Moving from a process to a technical requirement is challenging. It takes organization, diligence, and logic.

How does the Plan toolkit help?

- The Plan toolkit provides templates to organize data elements that go in and out of the automation
- It should be used in conjunction with the PDD for development

Who should use it and when?

- Solution architects and developers
- Solution architects start using this document when getting to build but keep it maintained so long as the automation is live

Let's zoom in

We will be discussing four distinct phases, which start after process mapping is complete.

Export Details

Isolate the population and find the best way to get it into your platform

Queue Creation

Outline the data fields for automation assignment and tracking purposes

Log Creation

Finalize the data set that the automation will utilize in totality

Exception Handling

Outline exception details required to build and record outputs from the automation

The purpose of the export

Exports will define the population going through the automation and the fields that the automation needs to navigate all the steps.

Isolate your population

- From shadowing, you should understand how the end-user accesses their population
- Use IT and SMEs to understand the best database

Define requirements to navigate the automation

- Standardized field requirements in the report need to:
 - Allow the automation run through completion
 - Aid the automation in tracking completion, errors, etc.

Export creation cautions

Do not wait to validate the export with your SMEs and consistently check these items as you build your export.

Volume gut-check • Does the export contain expected population? • Does population meet ROI expectations?	Alignment to the process • Marry the export to steps in your process map • Spot check accounts to ensure they meet process requirements
Data validity • Are the values required for automation available? • Are the values real-time?	SME sign off • Have SMEs review the export for accuracy of data • Data elements are often not what the SMEs typically use

Export creation - discussion

There is no 'right-way' but certain factors will play a role, mainly your infrastructure and tools.

Infrastructure
matters



On-Premise vs. Cloud

Database structure will require more alignment across automations in an On-Premise set-up

Use the tools at your
disposal



SQL vs. EHR vs. ???

- Export a workqueue
- Build a report in your EHR
- Build a report with database management tools

Queuing

Once the the export is validated, delineate the fields that must go into the automation for navigation and tracking.

Two reasons for using export fields in the automation queue

1. **Navigation:** the field is used during the automation to process an action, provide a value to search, etc.
2. **Tracking:** the field is used for analytical insight for departmental, payer, process, etc. related tracking

Discussion:

Is it worth removing unnecessary fields in your export if they won't be used for navigation or tracking?

Logging

Logging is the action of recording/storing the outputs to support the goals of the automation. Combine this with the values required for automation navigation and tracking (e.g. Queuing).

Considerations

- The must haves:
 - Output = success/failure
 - Process time = when was the action processed?
- Additional fields to log would depend upon the automation, a few examples are:
 - **Claim Status:** status, status details, check number, check date, etc.
 - **COB Reorder:** COB 1 payer, COB 2 payer, updated filing order
 - **Adjustments:** account balance, adjustment amount, transaction code

Exception Handling

Exception handling is muscle memory that many healthcare organizations don't have. It's also important for speeding up development and minimizing maintenance issues.

Why?

- Documenting the exceptions poorly will result in low volume, a high skip-rate or long term maintenance issues
- A strong understanding of the data elements and logic allow developers to move quickly
- If this information isn't updated or maintained and the automation must be updated, developers must reverse engineer the logic by looking at the code - challenging if that person isn't the primary developer

Discussion: What is better?

- A. My total queue size is 2000 accounts and 1000 are successfully processed
- B. My total queue size is 1000 accounts and 1000 are successfully processed

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