

Tarpon Automation Exchange

From automation strategy to measurable operational value

September 10, 2026

Treatment Order Review



1 FTE

estimated capacity released

Objective

Review accounts and determine whether a new authorization is required.

Impact

Enable proactive authorization checks, reduce denial risk, and decrease manual review effort.

Monthly volume

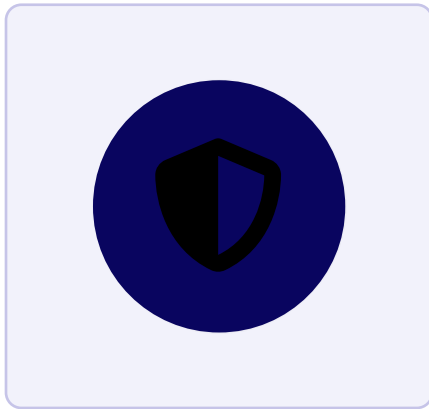
Approximately 3,000 accounts reviewed or validated.

Status

Development and testing; preparing for deployment.

Audience takeaway: High-volume authorization manual review is being standardized and automated.

IPO Validation



2 FTEs

estimated capacity released

Objective

Validate that the IPO procedure was performed and the account has the correct IPO code and category.

Impact

Help prevent denials and write-offs while reducing claim rework and resubmission effort.

Monthly volume

Approximately 3,000 to 4,000 patient accounts validated.

Status

Live in production.

Audience takeaway: The live agentic workflow combines validation at scale with exception-focused review.



The agent receives standardized instructions and decision criteria for the IPO account review.

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## Work Steps
1. Receive the unstructured text input (clinical notes, procedure descriptions, summaries, or free-form text).
2. Extract the key medical, procedural, and descriptive terms from the input.
3. Query the IPO Database Index context using those terms.
4. Evaluate each retrieved result and assign a confidence score (0-100%) based on semantic alignment between the IPO code description and the input terms and intent.
5. Apply the three-tier confidence logic:
  - ANY result above 80% → Confirmed Match response.
  - Top result(s) between 60-80% (none exceed 80%) → Alternative Suggestions response.
  - ALL results below 60% → No Match response.
6. Return the structured JSON output matching the outputSchema exactly.

## Confidence Scoring Guidelines
- 90-100%: Exact or near-exact match in terminology and intent.
- 81-89%: Strong match with minor terminology differences.
- 61-80%: Partial match — relevant but not definitive; suggest as alternatives only.
- ≤60%: Too low — do not include in any response tier.
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The agent evaluates the available account information and applies the configured review logic.

User prompt



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Coverage

Analyze the following unstructured clinical or procedural text and match it to the most relevant IPO (Inpatient/Outpatient Procedure Order) codes using the IPO Database Index.

****Input Text:****

<unstructured_text> **T**unstructuredText x </unstructured_text>

****Steps:****

1. Extract the key medical, procedural, and descriptive terms from the input text above.
2. Query the ****IPO Database Index**** context using those extracted terms to retrieve candidate IPO codes.
3. Score each retrieved result on a 0–100% confidence scale based on semantic alignment with the input.
4. Apply confidence tier logic:
 - ANY result ****above 80%**** → CONFIRMED_MATCH
 - Top result(s) ****between 60–80%**** (none exceed 80%) → ALTERNATIVE_SUGGESTIONS
 - ALL results ****below 60%**** → NO_MATCH
5. Build the JSON output strictly matching the outputSchema:
 - ``matchStatus``: one of "CONFIRMED_MATCH", "ALTERNATIVE_SUGGESTIONS", or "NO_MATCH"
 - ``inputSummary``: 1-line summary of what the input text describes
 - ``matchedCodes``: array of matched codes with ipoCode, description, confidenceScore — populated only for CONFIRMED_MATCH (>80%); empty array otherwise
 - ``responseMessage``: concise message per the applicable output format (max 2 lines for CONFIRMED_MATCH)



The workflow returns a clear disposition and identifies when additional review is recommended.

D082326-07 ALTERNATIVE_SUGGESTIONS - ⚠ No high-confidence match found (>80%). Alternative suggestions exist between 60–80% — human review recommended.
D082326-07 CONFIRMED_MATCH - ✅ Yes, match found. IPO Code: 59120 — Treat ectopic pregnancy with removal of tube/ovary (90% confidence).
D082326-07 NO_MATCH - ⚠ No IPO code match found. No codes with greater than 60% confidence could be matched to the provided input.

01



Explainability

Agent decisions can involve multiple reasoning steps.

Design response

Log prompts, decisions, responses, and actions.

02



Architecture complexity

Multi-agent designs can expand quickly.

Design response

Keep each agent responsibility small and focused.

03



Model change and variability

Outputs may change as models evolve.

Design response

Use benchmark datasets, validation, monitoring, and regression tests.

04



Epic change governance

New workqueues and filters can create duplication.

Design response

Define ownership and review changes for sustainability.

Core lesson: Agentic automation requires stronger observability, testing, and governance than traditional RPA.

Thank you

Questions & discussion

Tarpon Automation Exchange