

Process Design Document / Solution Design Document

Process Name: General Surgery Referral Automation

Purpose of Document

This document serves as the technology policies and procedure for Intelligent Automation Hub at Geisinger

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1. Document Control

Applies to:	All IAH RPA Operating Model
Classification:	Highly Confidential
Owner:	Intelligent Automation Hub Team

DOCUMENT HISTORY

Version	Date	Author	Approver	Reasons for Change
1.0	9/20/23			Initial Draft
1.1	5/6/24			Added steps for duplicate referral
1.2	9/13/24			Added steps for BE = Optum Veterans Affairs
1.3	9/23/24			Added steps for using a smartphrase to send letters to PCP vis communication management

REVIEW/APPROVAL

Role	Name	Date
SME		
Process Owner		
Business Architect		
IAH Director		
Developer		

STAKEHOLDERS

Role	Name	Email
Process Owner		
SME		
Business Architect		
IAH Director		
Developer		

2. Document Details

2.1 PURPOSE OF THIS DOCUMENT

The Process Design Document outlines the business process chosen for automation and the technology being utilized.

The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation and how they are envisioned to work after automating it, partly or entirely. This specifications document serves as a base for developers, providing them with the details required for applying automation to the selected business process.

3. Current State Process Description

3.1 PROCESS SUMMARY

The purpose of this automation is to automate referral requests to the PCP when an insurance requires a referral, and no referral is on file.

PAR staff need to manually review reports (Receptionist report and or Unauthorized report) to identify patients who do not have a referral for their upcoming specialty appointment. Once identified, referral requests are sent to the PCP.

Pain Points: This process is a labor-intensive process and due to this, the reports are not run on a regular basis.

3.2 DATA FLOW & APPLICATIONS

3.2.1 INPUT

Input	Format	Location	Is it natively digital?	Is it structured?
Epic Referral Workqueue		Epic	Yes	Yes

3.2.2 OUTPUT

Output	Format	Location	Frequency	Comment
Status Report	Excel	Outlook email	Daily	

3.2.3 APPLICATIONS

Application	Version	Interface	Req Key / Operation / URL	Comment
Epic		Citrix	Test and Prod Bot Username	BA needs to request
MS Excel		Desktop Application		Bot user will have VDI

3.3 BUSINESS RULES

Rule	Detail
Automation frequency	Daily
Bot start time	
Patient unique field	MRN
Excluding weekends and holidays	Yes, only runs Monday – Friday

SLAs	EOD
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3.4 CURRENT STATE METRICS

Avg. Daily Transactions	# Batches Daily	Avg. Volume / Batch	Weekly Avg. Volume	Frequency
173	1	238	865	Daily

3.5 CURRENT STATE PROCESS FLOW

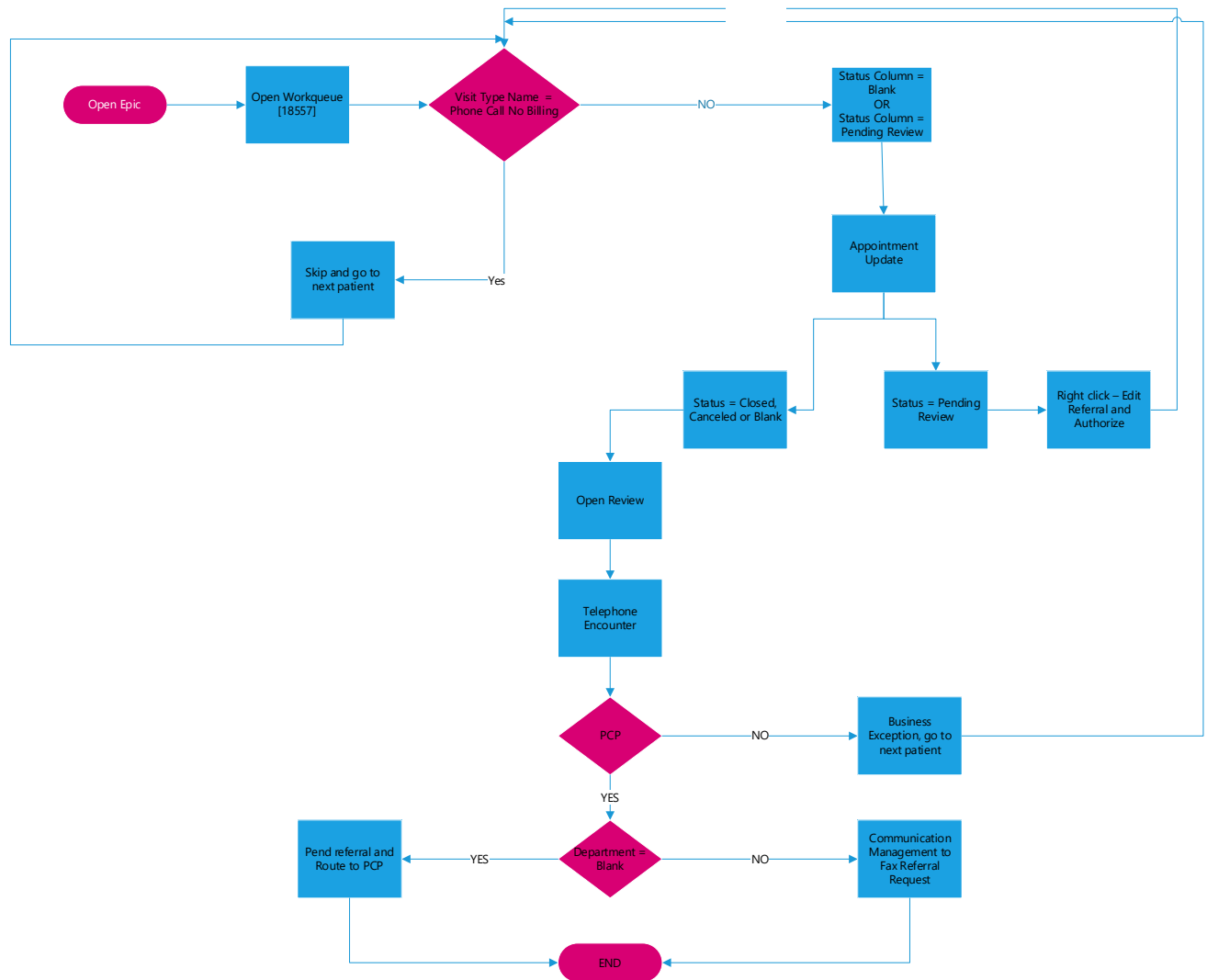
High Level Process Flow (Current state):

1. PAR staff for each clinic manually pulls reports daily to identify patients who do not have a referral for their upcoming specialty appointment.
2. Once identified, referral requests are sent to the PCP
 - Geisinger PCP
 - Generate Epic telephone encounter
 - Pend appropriate referral
 - Route referral request to PCP
 - Non-Geisinger PCP
 - Fax referral request

4. Future State Process Description

4.1 FUTURE STATE PROCESS FLOW

Bot Automation Process & Workflow Diagram (Future State):



1. Bot logs into Epic
2. BOT will go to referral workqueue
3. Bot will identify patients who do not have an authorized referral for their upcoming specialty appointment
4. Bot will authorize pended referrals and assign to appointment
AND / OR
5. Bot will send a referral request to the PCP on file (Initial request sent 14 days prior to DOS. If no referral order a 2nd request will be sent 5 days prior to the DOS and then daily until DOS)
 - Geisinger PCP
 - Generate Epic telephone encounter, use smart phrase for documentation purposes
 - Pend appropriate referral
 - Route referral request to PCP
 - Non-Geisinger PCP

- Generate Epic telephone encounter, send communication management to PCP requesting referral using letter template

4.2 IN SCOPE FOR RPA

100% of current state process is in scope for RPA.

4.3 OUT OF SCOPE FOR RPA

The actions out of scope for RPA should be listed in the table below together with the reasoning.

Activity/Action	Reason for out of scope	Future State solution	Measures to be taken for future automation
N/A	N/A	N/A	N/A

4.4 FUTURE STATE DETAILED STEPS

Step	Short description of key process steps	Screenshot for reference
1.	Bot will log into Epic	
2.	Bot will click on User ID	

3.	Bot enter User ID and Press 'Tab'	
4.	Bot will enter Password	
5.	Bot will press 'Log in'	
6.	Bot will type department: GCMC GENERAL SURGERY [960012] Bot will click Continue	
7.	If Message of the Day appears, Bot will click OK	
8.	If this user agreement comes up, Bot will click OK	
9.	If 'What's New' video alert comes up, Bot will click 'Remind Me Later'	

10.	If ' Customize Your Home Activity ' pops up, Ignore it	
11.	If ' Change Challenge Answers ' pops up, Ignore it	
12.	If ' Work Better with Epic ' pops up, Ignore it	
13.	Bot will click on Workqueue List	
14.	If 'Workqueue List' is not on toolbar: Bot will click on Epic (top left)	
15.	Bot will enter 'Workqueue' in 'Search activities'	

16.	Bot will click on Workqueue List Toolbar	
17.	Steps 17-19 *ONE TIME ONLY* Bot will click on New Filter	
18.	Bot will type '18441' in Name Contains or ID and click Apply	
19.	Bot will click on star (turning it yellow) This will add the report to favorites	
20.	Workqueue list should default to Favs, if it does not, Bot will click on Favs	

21.	Bot will click 'Favs'	
22.	Bot will double click to open report # 18441 GS MISSING REFERRAL SURGERY INSTITUTE	
23.	1. Bot will sort work queue by Appointment Date. 2. Bot will identify appts that are > 14 days from the date of visit. 3. Bot will initiate referral capture workflow for these patients. 4. Bot will send 2nd referral request if/when referral is not linked to appointment, (5) days out from the date of visit. Bot will	

	route encounter as high priority. 5. Bot will continue to send referral request (resend encounter as high priority) if/when referral is not linked to appointment every day until DOS. (Friday prior for Monday)	
24.	Bot will skip all patients with Visit Type = PHONE CALL NO BILLING	
25.	Bot will skip all appointments with Dept Specialty = -Dentistry -Plastic Surgery -Ophthalmology -Optometry -Oral Maxillary Surgery -Orthodontics -Transplant Clinic	c

	-Transplant Surgery -Urology	
26.	The bot will not work appointments when the Visit Coverage = Optum Veterans Affairs . The bot will send a Business Exception BE = Visit Coverage Optim Veterans Affairs	
27.	Bot will only work Referral Status = Pending Review and Referral Status = Blank	
28.	Status = Pending Review Bot will click line item (patient/	

	referral info will populate on screen	
29.	Bot will copy Appointment Date (this will be used to determine the encounter date on step 57)	
30.	Bot will copy Dept Specialty (this will be used to determine the referral type on step 41)	
31.	Bot will click 'Appointment Update' *If the Appointment Update link is not available, the Bot will report it as a Business Exception. BE = Appointment Update link not available on WQ	
32.	If Bot lands on 'Break-the- Glass' window,	

	it will click 'Cancel' and move on to the next patient. *Break the glass patient will be reported as business exceptions, reason = BTG	
33.	If the deceased patient pop-up opens, Bot will click 'OK' *Deceased patients will be reported as a business exception, pt deceased. Bot will exit the patient's encounter and start processing the next patient	
34.	If 'No Security' pop-up opens, Bot will click 'OK' *No Security patients will be reported as a system exception,	

	reason= security issue*	
	Bot will exit the patient's encounter and start processing the next patient	
35.	If bot lands on this screen, bot will click Appt Desk	
36.	Bot will click on Review	
37.	Bot will select Referrals Tab	
38.	Bot will click on Filters	
39.	Bot will apply the following filter: Referral Status= AUTH PEND	

40.	Bot will apply the following filter: Specialty Referred To	
41.	Bot will type 'Surg' in the 'Specialty Referred to contains' field and click on the green plus sign (This will filter Surgery referral types) Add filter for specific dept/referral	
42.	Example of filter results for 'specialty referred to contains'	
43.	Bot will reference step 29 for Dept Specialty and open department/Referral list in Teams to match Dept	

	Specialty to Referral Type. Gen Surg Referral Type Department List.xlsx	
44.	Bot will right click on referrals in a PEND status and click 'show preview'	
45.	Bot will click on blue hyperlink Referral # Bot will copy referral #. To be used on step 60	
46.	Bot will click on Status/ Magnifying Glass	
47.	Bot will select Authorized [1]	
48.	Click Accept	

49.	If the following 'Unable to accept' screen opens, Bot will select Go Back	
50.	Bot will land on 'Expiration Date' field	
51.	Bot will enter Y+1 into the 'Expiration Date' field	
52.	Bot will click Accept	
53.	If the following pops up: Referral Entry Unable to Accept 'Please complete the following fields: Pre-Cert # is required.' Bot will click Go Back This will be a business	

	exception. Business Exception reason = Pre- Cert Required	
54.	Bot will click cancel	
55.	If bot gets the following 'potential duplicate referral found' screen, Bot will click 'Continue Anyway'	
56.	Bot will close chart review screen	
57.	Bot should be on Appt Desk	
58.	Bot will click Future tab	
59.	Bot will review future appointments and right click on Future Gen Surg Appointment Appointment Date copied	

	from step 28 = Encounter Date	
60.	Bot will select 'Assign Referral'	
61.	Bot will match copied Referral ID from step # 44	
62.	Bot will right click and select Assign Referral	
63.	If Assign Warning pops up for referral and appointment do not match Bot will click 'Continue Assigning'	
64.	If your referral is not listed, check for filters, and remove	
65.	Bot will click on Filter	

66.	Bot will remove all checkmarks /filters	
67.	Now that filters have been removed, referral should list	
68.	Right click on referral and Click Assign Referral	
69.	Bot will close Referral Action screen	
70.	On Future tab, Green check mark will appear under Referral column after referral is assigned	
71.	Bot will copy CSN # for future appointment and add it to the QA Output file on the ROI Tab	

72.	Bot will copy Hospital Account # for future appointment and add to QA output file on the ROI Tab	
73.	Exit Appointment Desk And work next patient on workqueue	
74.	Status = Pending Review Bot will click line item (patient/ referral info will populate on screen If there is a Referral attached, Bot will click on blue hyperlink	
75.	Bot will click on Status/ Magnifying Glass	

76.	Bot will select Authorized [1]	
77.	Click Accept	
78.	If the following 'Unable to accept' screen opens, Bot will select Go Back	
79.	Bot will land on 'Expiration Date' field	
80.	Bot will enter Y+1 into the 'Expiration Date' field	
81.	Bot will click Accept	
82.	If the following pops up: Referral Entry Unable to Accept	

	'Please complete the following fields: Pre-Cert # is required.' Bot will click Go Back This will be a business exception. Business Exception reason = Pre-Cert Required	
83.	Bot will click cancel	
84.	If bot gets the following 'potential duplicate referral found' screen, Bot will click 'Continue Anyway'	
85.	Bot should land back on WQ. Referral is now in an Authorized Status Bot will click Appointment Update	

86.	On Future tab, Green check mark will appear under Referral column after referral is assigned	
87.	Bot will copy CSN # for future appointment and add it to the QA Output file on the ROI Tab	
88.	Bot will copy Hospital Account # for future appointment and add to QA output file on the ROI Tab	
89.	Exit Appointment Desk And work next patient on workqueue	
90.	Status = Blank Bot will click line item (patient/	

	referral info will populate on screen Bot will copy Visit Type name, to be used in Step 130 and Step 154	
91.	Bot will copy Appointment Date (this will be used on step 166)	
92.	Bot will copy Dept Specialty (this will be used to determine the referral type on step 101 and to determine the type of referral order to pend on step 125 and to determine the referral type to include in letter on Step 155)	
93.	Click on Appointment Update	
94.	Click on Appt Desk	

95.	Find future scheduled appointment and copy Department and Provider Name/ID (will need at step 109, 127, and 128)	
96.	Bot will click on Review	
97.	Bot will select Referrals Tab	
98.	Bot will click on Filters	
99.	Bot will apply the following filters: Referral Status = AUTH PEND *one or both of Status may not exist if referral was never ordered	

100.	Bot will type 'Surgery' in the 'Specialty Referred to contains' field to filter only Surgery referral types	
101.	Example of filter results for 'specialty referred to contains'	
102.	Bot will reference step 91 for Dept Specialty and open department/ Referral list in Teams to match Dept Specialty to Referral Type. Gen Surg Referral Type Department List.xlsx	
103.	If Surgery referral is listed in an AUTH status OR PEND status, do not send Telephone	

	encounter to PCP	
104.	If unable to filter by Status and or Surgery Specialty = No Surgery referral ordered. Bot will send Telephone Encounter to PCP	
105.	Click on Tel Enc to create a telephone encounter Copy patient Name, DOB and MRN	
106.	Select patient under 'Currently Open' Confirm you have the correct patient by checking patient Name, DOB and MRN	

107.	If this screen opens, select 'Create an Encounter'	
108.	Date = defaults with today's date Provider = Bot will click on PCP	
109.	Department = will default with Geisinger PCP department. *Non-Geisinger PCP will not have a department*	
110.	If department is blank, this indicates a non-Geisinger PCP. Enter department # from step 94	
111.	Click Accept	

112.	*If PCP is greyed out, business exception, go to next patient Business exception reason = No PCP	
113.	Click on Reason for Call	
114.	Add a new reason: Enter 728	
115.	Reason for Call: Referral Requested by Specialist [728]	
116.	Add Comments: IAH Referral Request and click Close	
117.	Navigate to Documentation /My Note section.	

	If Documentation /My Note section is not visible on screen, Bot will click the following button to Open Sidebar	
118.	If Geisinger PCP, Bot will select the PCPREFERRAL REQUEST speed button to enter the following: "Your patient has an upcoming Surgery appointment. Their insurance requires an active referral be on file. Please sign pended referral order to ensure we comply with insurance requirements. Please do not reply to sender, this is an automated message. The mailbox is not monitored."	
119.	If non-Geisinger PCP, Bot will select the NONGHSPCP	

	speed button to enter: 'Patient with upcoming Surgery appointment. Referral order request sent to PCP.'	
120.	Click Accept	
121.	Click on Routing	
122.	Click on PCP	
123.	Example of PCP entered in Routing	
124.	If PCP is not an option, SKIP to step 145	
125.	Click on 'Add order'	
126.	Bot will Enter Referral Order based off the Dept Specialty copied from step 91.	

	Bot will reference Gen Surg Referral Type spreadsheet: Gen Surg Referral Type Department List.xlsx Example: Dept Specialty = General Surgery; bot will order a General Surgery Referral OP [EPIC225]	
127.	If the Order and SmartSet Search opens, the bot will click on the Referral Order and then Accept If the bot opens to the Referral Order Screen, the bot will jump to Step 137 Example: SURGERY REFERRAL OP	

128.	If Potential Duplicate Orders Found pops up, the bot will select Cancel The bot will report this as a Business Exception. Business exception reason: Duplicate Order (if no pop up, the bot will proceed to step 137)	
129.	Bot will return to Documentation and select Edit	
130.	The bot will delete all text (Ctrl+A)	
131.	The bot will select the speed button: "DUPORDERGE NSURG" to enter:	

	Surgery Referral already placed by PCP	
132.	The bot will select Accept	
133.	The bot will close the encounter by selecting SIGN ENCOUNTER The bot will work the next patient in the WQ	
134.	The bot should be back on Appt Desk/Appoint ment Desk	
135.	Bot will Exit Appt Desk	
136.	The bot will work the next patient on the Patient Workqueue	
137.	The bot will enter 'To Provider'	

	Enter provider ID copied from future schedule (step 94)	
138.	Select provider name and department copied from the future schedule, copied from step 94	
139.	If this pop-up appears once a provider is selected the bot will enter '1' in the reason field: 'Patient Request'	
140.	If there are no matching results in the Provider Finder, the bot will click Cancel and proceed with the next step leaving the "To Provider" field blank	
141.	Bot will select 'What	

	condition is the patient being referred for?’ from the list. Bot will select the reason that matches the Visit Type. Visit type copied from Step 89 If there is not a 1:1 match from visit type = Reason, leave blank	
142.	Click Accept	
143.	If the Alternative Selection pops up, the Bot will select Continue	
144.	Click Pend	
145.	Click Chart Review	
146.	Click on Encounters	
147.	Bot will verify Telephone encounter with	

	today's date has been created. Description = Referral Requested by Specialist (IAH Referral Request)	
148.	Click on 'Call Intake'	
149.	Click on Routing	
150.	Click Send and Close Workspace	
151.	The bot should be back on Appt Desk	
152.	Bot will click on Future tab	
153.	Bot will copy CSN # for future Surgery appointment Bot will add CSN to the QA Output file on the ROI Tab	

154.	Bot will copy Hospital Account # for future Surgery appointment and add to QA output file on the ROI Tab	
155.	Bot will Exit Appt Desk	
156.	Close patient	
157.	When PCP is not an option to Route encounter – Bot will click Communication to request referral from non-Geisinger PCP	
158.	Click on New Communication	
159.	Click on PCP	
160.	Bot will review providers' communication preferences. If communication preference =	

	Mail, bot will continue with step 149. If communication preference = Fax, bot will jump to Step 157	
161.	If the communication preference = Mail, Bot will mark this as a Business Exception. BE reason: PCP does not have a fax number	
162.	Bot will click Cancel	
163.	Bot will select Discard Changes	
164.	If the communication is listed under Drafts, Bot will remove communication by clicking on the X	

165.	Bot will click on Call Intake	
166.	Bot will navigate to Documentation and click Edit	
167.	Bot will highlight documentation and click on NOFAX speed button	
168.	Bot will close the encounter by clicking on SIGN ENCOUNTER And work next patient on the list.	
169.	If the communication preference = Fax, Bot will continue with the next step	
170.	Click on magnifying glass under Choose Letter	

171.	Select the following letter template: "AEC REFERRAL REQUEST BY SPECIALIST LETTER" Bot will click Accept	
172.	Click on Details	
173.	Click on Reason for letter, enter 17 (Patient Referral)	
174.	Click on Letter Comment	
175.	Enter "IAH Referral Request"	
176.	The bot will delete the following sentence	
177.	Click F2 on keyboard	

	Replace the second *** with Dept Specialty copied from step 91 (delete ***)	
178.	If the following is listed under the salutation: 'No information on file' Bot will first delete and then enter the following smartphrase: 'deptadd'	
179.	Click Send Now	
180.	Letter sent confirmation page	
181.	Click on Chart Review	
182.	Click on Letters	
183.	Bot will QA that a letter has been created for	

	today's date and was sent Creation Date = Today Comments = IAH Referral Request Status = Sent	
184.	If Letter does not exist, bot will go back and process letter to request referral starting with Step 145	
185.	Bot will Close encounter by selecting 'Sign Encounter'	
186.	Bot should be back on Appt Desk	
187.	Bot will click on Future tab	
188.	Bot will copy CSN # for future Surgery appointment, encounter date	

	copied from step 90. Bot will add CSN # to the QA Output file on the ROI Tab	
189.	Bot will copy Hospital Account # for future Surgery appointment and add to QA output file on the ROI Tab	
190.	Example of ROI tab on Output File	
191.	Bot will Exit Appt Desk	
192.	Close patient	
193.	Review QA log from previous day. (14) business day after DOS Bot will check appointment status (Copy patient MRN)	

194.	Open Appointment Desk, bot will click on Appts	
195.	Bot will click Past. Bot will look for the following Encounter Status = No Show; Can and Comp	
196.	Encounter Status = No Show; Can and Comp Bot will verify Encounter Date and Department match Bot will copy Visit Type and add to QA file	
197.	Example of QA file 'Success tab'	
198.	When all patients have been worked, Logout of Epic	
199.	Close Epic Application	

4.5 EXCEPTIONS IN THE PROCESS FLOW

Exception	Actions	Comment
Patient Not Found	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Break-the-Glass	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Deceased	Flag in output file and continue to next Masterfile entry to process	Business to work manually
No PCP	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Restricted Referral/No Security	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Pre-Cert Required	Flag in output file and continue to next Masterfile entry to process	Business to work manually
PCP does not have Fax	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Appointment Desk link is not available in WQ	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Duplicate Referral Order	Flag in output file and continue to next Masterfile entry to process	Business to work manually
Optum Veterans Affairs Visit Coverage	Flag in output file and continue to next Masterfile entry to process	Business to work manually

4.6 SYSTEM ERRORS

Error	Action	Comment
Application crash (Epic)	Recover and retry 3 times If unsuccessful bot will reprocess with next run	
Epic Downtime	Pause bot if during run time	
Epic Upgrade	Review with business and determine what/if any action is necessary	

4.7 PROCESS CONTINUITY

Prevention: Establishing and defining what redundancies and protocols are in place to prevent failures in the process and maintain business continuity Detection: Defining what protocols are in place for monitoring the process to detect bugs and stop incorrect actions at all points post go-live and escalated monitoring during massive systems changes Recovery Assessing the level of risk, define strategic stakeholders to be alerted in need of a recovery and outlining the recovery plan to get back to operational state.			
Scenario	Prevention	Detection	Recovery
Workqueue file format change or workqueue is blank (no data).	Business to notify IAH regarding upcoming changes. IAH and Business work together to prepare and follow change management process.	Bot finds out the unexpected file format and fails to complete the process.	- Bot sends notification email to those who are on the distribution list and IAH Prod support team. - Business and IAH work together prepare and follows change management process.
Bot not completing as outlined in PDD during Hypercare.	N/A: What was not known was not preventable.	Hypercare Phase: Daily auditing is performed and process logs are monitored.	IAH team adjusts bot design to improve business exceptions.
Bot not completing as outlined in PDD during QA / Production	N/A: What was not known was not preventable.	Will be reported by business	Bot may be paused until next steps are identified.
Higher than expected system exceptions.	N/A: What was not known was not preventable.	Insight Dashboards created during UAT for long term monitoring of volume and exception changes (increases or decreases).	- Alert/pulses identified and notifications sent to IAH Comm Support. - Business and IAH work together if additional phase is needed.

			ServiceNOW incident reported and escalated as needed.
Output file errors (timing, format, info, reporting).	N/A: What was not known was not preventable.	Hypercare Phase: Daily auditing is performed and process logs are monitored. Insight Dashboards created during UAT for long term monitoring of volume and exception changes (increases or decreases).	- Business and IAH team adjusts bot design to identify output file errors. - Business and IAH work together if additional phase is needed.
Automated QA Bot.	Bot produces email/confirmation/notification of summary indicating input matches output file/data/action results.	Bot indicates in email either success or failure of input=output comparison.	IAH Support and/or business reviews and determines next steps.
Unknown reasons If the bot fails, how will it continue and resolve issue?	N/A: What was not known was not preventable.	Bot is unable to complete the automated process.	- Bot sends notification email to those who are on the distribution list and IAH Prod support team [iah_rpa_prod_support@geisinger.edu]. - The Bot Controller will then be responsible to triage the bot disruption, fix the issue(s), and either schedule ad hoc processing or resume the bot processing.
Input file format change or input file is blank (no data).	Business to notify IAH regarding upcoming changes. IAH and Business work together to prepare	Bot finds out the unexpected file format and fails to complete the process.	- Bot sends notification email to those who are on the distribution list and IAH Prod support team. - Business and IAH work together prepare and

	and follow change management process.		follows change management process.
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5. Technical Details

Item	Description	Comment
Robot Type	Unattended	
Orchestrator used?	Yes	On-Premise Version
UiPath version used	2020.10.4	

6. Reporting

Report Type	Update Frequency	Details	Distribution List
Referral Process Report	Daily	Report status of processed transactions via email: Attach Output File - Subject: IAH General Surgery Referral Automation Daily Summary (example) mm/dd/yy - Body: Example-	

		Please see attached daily report. Tab 1: Business Exceptions = how many Tab 2: System Exceptions = how many Tab 3: Success = how many Tab 1 = Business Exception Add the following columns: A = MRN B = Patient Name C = Appointment Date D = Visit Type Name E = Department F = Dept Specialty G = Visit Coverage H = Referral # I = Referral Status J = Exception Reason Tab 2 = System Exception Add the following columns: A = MRN B = Patient Name C = Appointment Date D = Visit Type Name E = Department F = Dept Specialty G = Visit Coverage H = Referral # I = Referral Status Tab 3 = Successful Add the following columns A = MRN	
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		B = Patient Name C = Appointment Date D = Visit Type Name E = Department F = Dept Specialty G = Visit Coverage H = Referral # I = Referral Status	
Referral Error Logs	After 3 days	Report of process errors Subject: IAH General Surgery Referral Automation Error mm/dd/yy Body: Bot failed due to system error. Please manually process today.	

7. Environment Details

Application	Development Stage	Environment	Access Type	Access Key/Credential
Epic	Development	<Epic_Dev>	Username And Log in dept	Username: Login Department:
	Test	<Epic_Test>	Username And Log in dept	Username: Login Department:
	Prod	<Epic_Prod>	Username And Log in dept	Username: Login Department:
Outlook	Development /Test/UAT/Prod	<Environment Name>	Email account	Email: TBD@geisinger.edu

8. Assumptions

Assumption	Impact
The entire process is automated end to end with no manual intervention.	
The distribution list, email addresses, and/or shared mailbox listed in the PDD for the purpose of process notification through email are to be maintained solely by the line of business.	

9. ADDITIONAL SOURCES OF PROCESS DOCUMENTATION

Type	Name	Link	Comments
Discovery Assessment			IAH Teams Folder
Step Recording (video)			IAH Teams Folder
Task Capture			IAH Teams Folder
UAT Recording (video)			IAH Teams Folder
Executive Summary			IAH Teams Folder
Dept List			IAH Teams Folder
Referral Type List			IAH Teams Folder

10.1 GLOSSARY

Acronym/Term	Meaning
PDD	Process Design Document – document that contains information about the process in scope for automation and about the agreed technical solution
RPA	Robotic Process Automation
MRN	Medical Record Number
IAH	Intelligent Automation Hub
SLA	Service Level Agreement