

Process Design Document / Solution Design Document

Process Name: Nursing –Violent Restraints Chart Audits

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
1.1	2/11/2022			Initial Draft
1.2	4/11/2022			Workflow update
1.3	8/4/2022			Epic upgrade update
1.4	5/9/2023			Epic SU updates
1.5	9/11/2023			Epic SU updates
1.6	12/28/23			Revisions
1.7	10/16/24			Revisions

REVIEW

Role	Name	Date
Process Owner		
SME		

STAKEHOLDERS

Role	Name	Email
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Process Owner		
SME		
Process Architect		
IAH Director		
Developer		
EPIC HIT		

2. Document Details

2.1 PURPOSE OF THIS DOCUMENT

This document intends to provide a detailed process and solution design proposal for robotics automation of the 'Violent Restraint Chart Audits' process.

3. Current State Process Description

3.1 PROCESS SUMMARY

Currently users manually complete the order, and flowsheets for Violent Restraint patients in Epic, and then they are required to complete the chart audit forms for each patient and upload them on to designated SP site. This automation is going to use an Epic RWB report with orders , ADT events, and flowsheets information and will complete the chart audit forms for users and will upload them to the respective SP sites

3.2 DATA FLOW & APPLICATIONS

3.2.1 INPUT

Input	Format	Location	Is it natively digital?	Is it structured?
Epic Reporting Workbench report	.XLSX	Epic	Yes	Yes

3.2.2 OUTPUT

Output	Format	Location	Frequency	Comment
Chart Audit Forms	Excel	Network Drive	Created daily	Chart Audit forms of patients
Outlook Email	Email	N/A	TBD	Email containing process report

3.2.3 APPLICATIONS

Application	Version	Interface	Req Key / Operation / URL	Comment
Outlook	2016	Desktop Application	N/A	
Excel	2016	Desktop Application	N/A	
SP		Sharepoint Folder	TBD	Access needed for the BOT
EPIC			<IAHAUDITS>	

3.3 BUSINESS RULES

Rule	Detail
Automation frequency	Daily every 4 hours
Bot start time	Dispatcher start to check the emailed reports from - Performer
Excluding weekends and holidays	No
SLAs	Robot finished run by next run

3.4 CURRENT STATE METRICS

Avg. Monthly Transactions	# Batches Monthly	Avg. Volume / Batch	Weekly Avg. Volume	Frequency
0-10 patients X 6 times a day X 30 days a month	6 times a day X 30 days a month	0-10 patients daily (in each run)	6times a day X 7 days a week	Daily every 4 hours

3.5 CURRENT STATE PROCESS FLOW

High Level Process Flow Diagram (Current state):

4.1 FUTURE STATE PROCESS FLOW

Bot Automation Process & Workflow Diagram (Future State):

1. Bot will run Epic RWB reports hourly and export the information
2. Bot will read all patient information from the excel report and Epic Report
3. Bot will complete chart audits forms for each patient
4. Bot will upload the completed audit forms on SP

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			

4.4 FUTURE STATE DETAILED STEPS

Bot Automation Process & Workflow Diagram (Future State):

RUNNING THE REPORT AND OBTAINING INFORMATION

1. Bot will type User Name

2. Bot will type Password

3. Bot will click Log In

4. Bot will log into: BOT GS IP [900046] department. Bot will click Continue

5. Bot will click OK

6.Bot will click on Epic icon

7. Bot will click next to the magnifying glass and type my reports

8.Bot will click My Reports

9. Bot will click inside the search box

10.Bot will type violent inside the box

11. Bot will click enter

12. Bot will see search results

13. Bot will click on the star to add the 'Violent restraint patients - bot' to favorites (will need to do this one time for the report to show up under the my reports tab)

14. Bot will click on the check box next to my favorites, this report will show up under My favorites moving forward

15. Bot will click on the report name to run it

16. Bot will click on open report and this shows up in top right. Bot will select open report.

If this doesn't show, on top right then bot will click on my analytics in bottom left of screen

Bot will select ready to view.

Bot will click View

17. When the report is ready Bot will capture the Patient Name and MRN

18. Bot will obtain the Location and department

19. Bot will obtain the admission date and time

20.Bot will obtain the discharge date and time if any

21.Bot will obtain the Violent Restraint Order date and time

22.Bot will obtain the Violent Restraint Order end date and time if any

23. The audits will continue as long as there is a new violent restraint order. Depending on the patient's age, a new order will be placed as follows:

Every 1 hour (Ages 8 or under)

Every 2 hours (Ages 9-17)

Every 4 hours (Ages 18 and older)

The audits will end if:

- There is no renewed violent restraint order **AND discontinued is documented in flowsheets. If other documentation continues then the bot should continue to run audit.**

If there is a renewed new violent restraint order. The bot will continue using the same audit form. (Patients' orders may get renewed every 1, 2 or 4 hours depending on the age of the patient)

Initiation – either the order starts, or specific flowsheet documentation begins, whichever comes first. The bot will end when the order is complete, expired, discontinued or canceled AND there is no specific flowsheet documentation – whichever ends the latest. Bot continues until the very last documented flowsheet if the flowsheet is documented past the order end time.

The audits will end if:

- There is no renewed violent restraint order. If there is a renewed new violent restraint order. The bot will continue using the same audit form. (Patients' orders may get renewed every 1, 2, or 4 hours depending on the patient's age)
- As long as it's the same admission bot will always go back to the initial chart audit form for that specific patient and a different admission will grant a new chart audit form.
- Bot may start with one violent restraint order
- That order may get cancelled and new one may get signed
- When it happens, Bot will see that violent restraint order date/time from the top report changed and new one has been signed
- Bot will use one chart audit form for these patients
- Orders will be in the ordered and cancelled fields (on separate rows) (most recent on top)
- Every day will get only one block (12am to 11pm)
- If there is a gap of more than 59 minutes between orders - the bot will gray out the hour blocks between orders if no other flowsheet documentation. If there is flowsheet documentation, then the row should be highlighted because there is no active order. – bot will continue documenting ADT, every 15 minutes, and will also look for initiation and discontinuation documentation
- If there is a gap of less than 59 minutes between orders – the bot will continue documenting ADT, every 15 min, and will look for initiation documentation,
 - if the new order is a different restraint type (left wrist vs right wrist for example) it will look for discontinuation documentation of the previous order
 - specific flowsheets outlined later on in PDD - must have “discontinued” documented when the order is no longer active,

- if discontinued is not documented then the bot will highlight the cell
 - Carry out the same logic as outlined later in PDD for other scenarios
 - if the new order is the same restraint type (left wrist vs left wrist for example) it will not look for discontinuation documentation of the previous order
- Bot will also enter the ordered started/reordered date and time, and completed/canceled date and time in appropriate blocks
- The very last order that is not canceled will be highlighted below

24.Bot will click on ADT Events tab

25.Bot will obtain all ADT event since violent order date/time until violent order end date and time (or 4 hours within the order date)

Only admission, transfer in EVENTS

Obtain date and time

Obtain "Unit" and "room" and "Bed"

26.Bot will click on Restraint Orders tab

27.Bot will find the restraint order that is the same as from the report

Top reports uses AM/PM time, and bottom report uses military time
12:05am 0005

Signed and Held orders will be excluded from the chart audits

28.Bot will obtain the restraint patient type with information

29. The same restraint patient with type should be documented during initiation.

All restraint types flowsheets vs order:

Velcro Blue/Red Right Wrist Q 15 min

Velcro Blue/Red Left Wrist Q 15 min

Velcro Blue/Red Right Ankle Q 15 min

Velcro Blue/Red Left Ankle Q 15 min

Velcro Blue/Red 4 Points Q 15 min

Velcro Blue/Red Bilateral wrist

Velcro Blue/Red Right wrist and Velcro Blue/Red Left wrist = Velcro Blue/Red Bilateral Wrist

Velcro Blue/Red bilateral ankle

Velcro Blue/Red Right Ankle and Velcro Blue/Red Left Ankle = Velcro Blue/Red Bilateral Ankle

Soft Restraint Right Wrist

Soft Restraint Left Wrist

Soft Restraint Right Ankle

Soft Restraint Left Ankle

Soft restraint Right Wrist and Soft restraint Left Wrist = Soft restraint Bilateral Wrist

Soft restraint Right Ankle and Soft restraint Left Ankle = Soft restraint Bilateral Ankle

Soft Restraint 4 Points = (Soft Restraint 4 Points) OR (Soft Restraint Right Wrist + Soft Restraint Left Wrist + Soft Restraint Right Ankle + Soft Restraint Left Ankle)

Velcro Blue/Red 4 Points = (Velcro Blue/Red 4 Points) OR (Velcro Blue/Red Right Wrist + Velcro Blue/Red Left Wrist + Velcro Blue/Red Right Ankle + Velcro Blue/Red Left Ankle)

4 Bed Rails

Mitt Right Hand

Mitt Left Hand

Mitt Bilateral

Mitt Bilateral Right Hand and Mitt Bilateral Left Hand = Mitt Bilateral Hand

Physical Restraint Type:	
Velcro Blue/Red Right Wrist Q ...	
Velcro Blue/Red Left Wrist Q 1...	
Velcro Blue/Red Right Ankle Q...	
Velcro Blue/Red Left Ankle Q ...	
Velcro Blue/Red 4 Points Q 15...	
4 Bed Rails	
Soft Restraint 4- Point	
Soft Restraint Right Wrist	
Soft Restraint Left Wrist	
Soft Restraint Right Ankle	
Soft Restraint Left Ankle	
Mitt Right Hand	
Mitt Left Hand	

30. Bot will check the Alternatives Before/Instead of and why alternatives not successful flowsheets

Obtain the date and time completed

Obtain the user name that is completed

31.Bot will always go back to the violent flowsheets tab and obtain the previously completed flowsheet information

Date and time are the first column

32.Bot will read the both flowsheets' past completion information in this flowsheet

Between the restraint order date and time, and end date and time

Who information always be the last column

- find the date/time of completion (first column)

Bot will always go back to the violent flowsheets tab
 and obtain the previously completed flowsheet
 information - find the date/time of completion
 Who information always be the last column
 Date/time will always be the first column

Uncascaded

Restraint Monitoring Q15 Minutes	
☒ Resp	
☐ Effort	
Circulation / Sign of injury	
☐ Level of Consciousness	
Behaviors/Mood/Neuro Sympt...	
Skin Color	

Cascaded

Restraint Monitoring Q15 Minutes	
Resp	
☐ Effort	
☐ Effort Characteristics	
Retraction Location	
Circulation / Sign of injury	
☐ Level of Consciousness	
Reason Unresponsive	
Behaviors/Mood/Neuro Sympt...	
Skin Color	

36. Bot will check 5 flowsheets that fall under Restraint education

Flowsheets (fall under restraint education)

- Discontinue Criteria
- Criteria explained
- Patient/Family Education
- Patient Response
- Notification

Obtain the date and time completed

Obtain the user name that is completed

Bot will always go back to the violent flowsheets tab and obtain the previously completed flowsheet information - find the date/time of completion

Who information always be the last column

37.Bot will click on the Restraint Care Plan tab

38. Bot will find the care plans that were active during restraint timeframe (status: active or resolved)

- Multi Disciplinary Problems: From Restraint (violent)
- Start Date and Expected End Date: Start Date will be on the same day of the violent restraint order date
- Scroll down to find the reviewed by name and date/time
- If this section is blank, patient does not have careplans

39. Bot will look at the Hourly Rounding - 4Ps

This flowsheets falls under "Hourly Rounding – 4Ps"

Obtain the date and time completed

Obtain the user name that is completed

Bot will always go back to the violent flowsheets tab and obtain the previously completed flowsheet information - find the date/time of completion

Who information always be the last column

COMPLETING THE CHART AUDIT FORM:

- Every patient gets one chart audit forms
- If orders are renewed every 1, 2, and 4 hours depending on the patient's age, the bot continues to use the same form
- Bot enters each order and cancels dates for each order and continues to audit under that section

- Bot will use one chart audit form for each patient.
 - Per encounter
- Bot will gray out the rest of the columns when one order is canceled in that section
- New order and new order columns will be in a new section

The audits will end if

- There is no renewed violent restraint order
If there is a renewed new violent restraint order. The bot will continue using the same audit form. (Patient's orders may get renewed every 1,2, or 4 hours depending on age)
- Bot may start with one violent restraint order
- That order may get canceled and a new one may get signed
- When it happens, Bot will see that the violent restraint order date/time from the top report changed and a new one has been signed
- Bot will use one chart audit form for these patients.
- Orders will be in the ordered and canceled fields (on separate rows) (most recent on top)
- Every day will get only one block (12 am to 11 pm)
- If there is a gap of more than 59 minutes between orders - the bot will gray out the hour blocks between orders. – bot will continue documenting ADT, per 15 minutes, and will also look for initiation and discontinuation documentation
- If there is no gap of more than 59 minutes between orders – the bot will continue documenting ADT, per 15 minutes, and will not look for initiation documentation
- Bot will also enter the ordered started/reordered date and time, and also completed/canceled date and time in appropriate blocks

ADD Q2 MONITORING SECTION AND INFORMATION

And add FACE TO FACE WITHIN 1 HOUR – pull in information but do not type missing or highlight yellow

Debriefing – pull in information but do not type missing or highlight yellow
length of order

Restraint Monitoring Q2 Hours	
ROM / Physical Comfort	
Supportive Counseling	
Event - Psych only	
Hourly Rounding - 4Ps - Pain, ...	
Restraint Order	
Length of Order	
Provider Notified	
Face to Face within 1 hour	

Length of order 501998

Face to face within 1 hour 502000

Debriefing 502023-

Physical Restraint Type:

Velcro Blue/Red Right Wrist Q ...

Velcro Blue/Red Left Wrist Q 1...

Velcro Blue/Red Right Ankle Q...

Velcro Blue/Red Left Ankle Q ...

Velcro Blue/Red 4 Points Q 15...

4 Bed Rails

Soft Restraint 4- Point

Soft Restraint Right Wrist

Soft Restraint Left Wrist

Soft Restraint Right Ankle

Soft Restraint Left Ankle

Mitt Right Hand

Mitt Left Hand

Debriefing

Debriefing

3

2 Hours

Flowsheets (falls under Restraint Monitoring Q2 Hours):

- ROM/Physical Comfort
- Supportive Counseling
- Event (Psych Only Departments)
- Hourly Rounding – 4Ps

Obtain the date and time completed

Obtain the username that is completed

Bot will always go back to the violent flowsheets tab and obtain the previously completed flowsheet information - find the date/time of completion

Who information always be the last column

When information always be the first column

40. Bot will type patients name and MRN

41. Bot will type admission date and time and discharge date and time

42. Bot will type location and department

43. Bot will enter the order for violent date and time and cancel date and time (if any)

- Each order will be entered (newest on top)
- Restraint Orders tab will provide each order start and end date

Bot will also enter every ordered/renewed violent restraint order and every completed/cancelled non-violent restrain order in the hour blocks in the audit form

	06-28	06-28	06-28	06-28	C
12am-1159pm	12am	1am	2am	3am	4
ADT EVENT					
ORDER STARTED/REORDERED and Completed/Cancelled				315am started/reordered	

44. Bot will plug every admission and transfer in ADT event into the ADT event row in the audit form. Bot will enter the Time/date, unit and Room and “bed” – Bot will wrap the text to ensure all texts are visible in the spreadsheet

1. Bot will also enter every ordered/renewed violent restraint order and every completed/cancelled violent restraint order in the hour blocks in the audit form

Flowsheets/Care Plans for the Chart Audits Form:

Documentation Upon Initiation/ADT Event	Within an hour of order signed
Document under Restraint Type (Start/continued verbiage)	Pull the name of the user completed in the flowsheet user row in the audit form Enter the flowsheet value (start or continued) and Enter the hour (515am etc.) Enter the flowsheet verbiage: Start for initiation Enter the flowsheet verbiage: Continued verbiage – ADT event (but do not highlight missing if continued not documented) Type: Flowsheet Value *** (Ordered: ***, Flowsheet: ***) Type: Enter the hour (515am etc) Flowsheet User: Pull the name of the user completed If the order type doesn't match the restraint type, Highlight the CELL in Yellow If the flowsheet is missing, type MISSING, Highlight the CELL in Yellow All restraint types flowsheets vs order: Velcro Blue/Red Right Wrist Q 15 min Velcro Blue/Red Left Wrist Q 15 min Velcro Blue/Red Right Ankle Q 15 min Velcro Blue/Red Left Ankle Q 15 min Velcro Blue/Red 4 Points Q 15 min (Velcro Blue/Red 4 Points = (Velcro Blue/Red 4 Points) OR (Velcro Blue/Red Right Wrist + Velcro

Blue/Red Left Wrist + Velcro Blue/Red Right Ankle + Velcro Blue/Red Left Ankle)

Velcro Blue/Red Bilateral wrist

Velcro Blue/Red Right wrist and Velcro Blue/Red Left wrist = Velcro Blue/Red Bilateral Wrist

Velcro Blue/Red bilateral ankle

Velcro Blue/Red Right Ankle and Velcro Blue/Red Left Ankle = Velcro Blue/Red Bilateral Ankle

Soft Restraint Right Wrist

Soft Restraint Left Wrist

Soft Restraint Right Ankle

Soft Restraint Left Ankle

Soft restraint Right Wrist and Soft restraint Left Wrist = Soft restraint Bilateral Wrist

Soft restraint Right Ankle and Soft restraint Left Ankle = Soft restraint Bilateral Ankle

Soft Restraint 4 Points = (Soft Restraint 4 Points) OR (Soft Restraint Right Wrist + Soft Restraint Left Wrist + Soft Restraint Right Ankle + Soft Restraint Left Ankle)

Velcro Blue/Red 4 Points = (Velcro Blue/Red 4 Points) OR (Velcro Blue/Red Right Wrist + Velcro Blue/Red Left Wrist + Velcro Blue/Red Right Ankle + Velcro Blue/Red Left Ankle)

4 Bed Rails

Mitt Right Hand

Mitt Left Hand

Mitt Bilateral

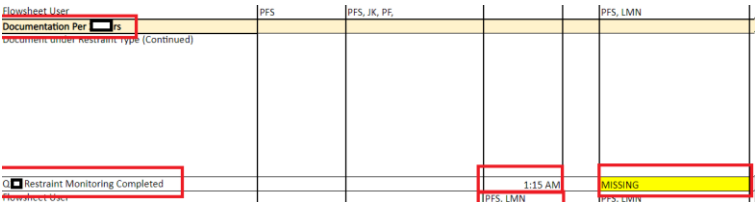
Mitt Bilateral Right Hand and Mitt Bilateral Left Hand = Mitt Bilateral Hand

ADT EVENT		
Documentation Upon Initiation/ADT Event		
Document under Restraint Type (Start/Continued)	1215am Start (Ordered: Left Wrist, Flowsheet: Left Wrist)	115am Start (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)
Alternatives Before / Instead of Restraints		1:00 AM
Name of Provider Notified Documented		1:00 AM
Q Restraint Monitoring Completed		1:00 AM
Education Completed		1:00 AM
Care Plans Added/Reviewed (within 24 hours of order time)		1:15 AM
Order Matches Restraint on Patient (Order/Flowsheet)	Yes (Bilateral Wrist)	No (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)
Safety Rounds		
Flowsheet User	PFS	PFS, JK, PF,

Alternatives Before / Instead of Restraints ***MAKE SURE FLOWSHEET IDS ARE AS OUTLINED ABOVE	Both of the rows Pull the name of the user completed Enter the hour (5:15am etc) 100% completion If the flowsheet is missing, type MISSING, Highlight the CELL in Yellow																																																																																																																														
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Q15m Restraint Monitoring Completed	Enter the hour (5:15am etc) Pull the name of the user completed 100% completion If the flowsheet is missing, type MISSING, Highlight the CELL in Yellow <table><tr><td>12am-1159pm</td><td>12am</td><td>1am</td><td>2am</td><td>3am</td><td>4am</td><td>5am</td><td>6am</td><td>7</td></tr><tr><td>ADT EVENT</td><td></td><td></td><td></td><td></td><td>INSERT ADT INFO</td><td></td><td>INSERT ADT INFO</td><td></td></tr><tr><td>Documentation Upon Initiation/ADT Event</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Document under Restraint Type (Start/Continued)</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td>1215am Start (Ordered: Left Wrist, Flowsheet: Left Wrist)</td><td>115am Start (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)</td><td></td><td></td><td>400amContinued(Ordered: Bilateral Wrist, Flowsheet: LeftWrist)</td><td></td><td></td><td></td></tr><tr><td>Alternatives Before / Instead of Restraints</td><td></td><td></td><td>1:00 AM</td><td></td><td></td><td>4:00 AM</td><td></td><td></td></tr><tr><td>Name of Provider Notified Documented</td><td></td><td></td><td>1:00 AM</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Q15 Restraint Monitoring Completed</td><td></td><td></td><td>1:00 AM</td><td></td><td></td><td></td><td>MISSING</td><td></td></tr><tr><td>Education Completed</td><td></td><td></td><td>1:15 AM</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Care Plans Added/Reviewed (within 24 hours of order time)</td><td></td><td></td><td>1:15 AM</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Order Matches Restraint on Patient (Order/Flowsheet)</td><td>Yes (Bilateral Wrist)</td><td>No (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Safety Rounds</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Flowsheet User</td><td>PPS</td><td>PPS, JK, PG</td><td></td><td></td><td>PPS, LMN</td><td></td><td></td><td></td></tr><tr><td>Documentation Per 2 hours</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>	12am-1159pm	12am	1am	2am	3am	4am	5am	6am	7	ADT EVENT					INSERT ADT INFO		INSERT ADT INFO		Documentation Upon Initiation/ADT Event									Document under Restraint Type (Start/Continued)										1215am Start (Ordered: Left Wrist, Flowsheet: Left Wrist)	115am Start (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)			400amContinued(Ordered: Bilateral Wrist, Flowsheet: LeftWrist)				Alternatives Before / Instead of Restraints			1:00 AM			4:00 AM			Name of Provider Notified Documented			1:00 AM						Q15 Restraint Monitoring Completed			1:00 AM				MISSING		Education Completed			1:15 AM						Care Plans Added/Reviewed (within 24 hours of order time)			1:15 AM						Order Matches Restraint on Patient (Order/Flowsheet)	Yes (Bilateral Wrist)	No (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)							Safety Rounds									Flowsheet User	PPS	PPS, JK, PG			PPS, LMN				Documentation Per 2 hours								
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Care Plans Added	Look for active or resolved careplans during violent restraint orders: Any of the below careplans exist [Restraints (Violent) Care Plan] Scroll down and obtain the date and time completed, username completed it, plug them into the audit form <table><tr><th>12am-1159pm</th><th>12am</th><th>1am</th><th>2am</th></tr><tr><td>ADT EVENT</td><td></td><td></td><td></td></tr><tr><td>Documentation Upon Initiation/ADT Event</td><td></td><td></td><td></td></tr><tr><td>Document under Restraint Type (Start/Continued)</td><td>1215am Start (Ordered: Left Wrist, Flowsheet: Left Wrist)</td><td>115am Start (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)</td><td></td></tr><tr><td>Alternatives Before / Instead of Restraints</td><td></td><td></td><td>1:00 AM</td></tr><tr><td>Name of Provider Notified Documented</td><td></td><td></td><td>1:00 AM</td></tr><tr><td>ADT Restraint Monitoring Completed</td><td></td><td></td><td>1:00 AM</td></tr><tr><td>Education Completed</td><td></td><td></td><td>1:00 AM</td></tr><tr><td>Care Plans Added/Reviewed (within 24 hours of order time)</td><td></td><td></td><td>1:15 AM</td></tr><tr><td>Order Matches Restraint on Patient (Order/Flowsheet)</td><td>Yes (Bilateral Wrist)</td><td>No (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)</td><td></td></tr><tr><td>Safety Rounds</td><td></td><td></td><td></td></tr><tr><td>Flowsheet User</td><td>PFS</td><td>PFS, JK, PF,</td><td></td></tr><tr><td>Documentation Per 2 hours</td><td></td><td></td><td></td></tr></table>	12am-1159pm	12am	1am	2am	ADT EVENT				Documentation Upon Initiation/ADT Event				Document under Restraint Type (Start/Continued)	1215am Start (Ordered: Left Wrist, Flowsheet: Left Wrist)	115am Start (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)		Alternatives Before / Instead of Restraints			1:00 AM	Name of Provider Notified Documented			1:00 AM	ADT Restraint Monitoring Completed			1:00 AM	Education Completed			1:00 AM	Care Plans Added/Reviewed (within 24 hours of order time)			1:15 AM	Order Matches Restraint on Patient (Order/Flowsheet)	Yes (Bilateral Wrist)	No (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)		Safety Rounds				Flowsheet User	PFS	PFS, JK, PF,		Documentation Per 2 hours											
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	If the flowsheet is missing, type MISSING, Highlight the CELL in Yellow 
Flowsheet User	Pull from the bottom flowsheet from the report or the top flowsheet
Documentation before discontinuation	
Document under Restraint Type (continued or discontinued) do not highlight yellow if continued not documented – must have discontinued, if not there highlight yellow	Pull the name of the user completed in the flowsheet user row in the audit form Enter the flowsheet value (start or continued) and Enter the hour (515am etc.) Enter the flowsheet verbiage: Continued/Discontinued verbiage Type: Flowsheet Value *** (Ordered: ***, Flowsheet: ***) Type: Enter the hour (515am etc) Flowsheet User: Pull the name of the user completed If the order type doesn't match the restraint type, Highlight the CELL in Yellow If the flowsheet is missing, type MISSING, Highlight the CELL in Yellow

All restraint types flowsheets vs order:
 Velcro Red/Blue R Wrist = Velcro Blue/Red Wrist R
 Velcro Red/Blue L Wrist = Velcro Blue/Red Wrist L
 Velcro Red/Blue R Ankle = Velcro Blue/Red Ankle R
 Velcro Red/Blue L Ankle = Velcro Blue/Red Ankle L
 Velcro Red/Blue 4 Points = Velcro Blue/Red 4 Points or Velcro
 Red/Blue R Wrist + Velcro Red/Blue L Wrist + Velcro Red/Blue R
 Ankle + Velcro Red/Blue L Ankle
 Soft Restraint R Wrist = Soft Restraint Wrist R
 Soft Restraint L Wrist = Soft Restraint Wrist L
 Soft Restraint R Ankle = Soft Restraint Ankle R
 Soft Restraint L Ankle = Soft Restraint Ankle L
 Soft Restraint 4 Points = Soft Restraint 4 Points or Soft Restraint R
 Wrist + Soft Restraint L Wrist + Soft Restraint R Ankle + Soft Restraint
 L Ankle
 4 Bed Rails = 4 side Rails Up while in Bed
 Mitt R Hand = no order
 Mitt L Hand = no order
 Mitt Hand R = Mitt Hand R
 Mitt Hand L = Mitt Hand L
 Mitt Bilateral Hands = Mitt Bilateral Hand or Mitt Hand R + Mitt Hand
 L

Document under Restraint Type (Start/Continued)	1215am Start (Ordered: Left Wrist, Flowsheet: Left Wrist)	115am Start (Ordered: Bilateral Wrist, Flowsheet: LeftWrist)
Flowsheet User	PFS	PFS, JK, PF,

When the order is cancelled, if there is more than 59 minute gap between the next order - the bot will gray out rest of the rows, but still obtain all the flowsheet information for that specific order. If the flowsheets are still completed, Bot will continue adding them to the previous orders flowsheet rows and highlight them yellow

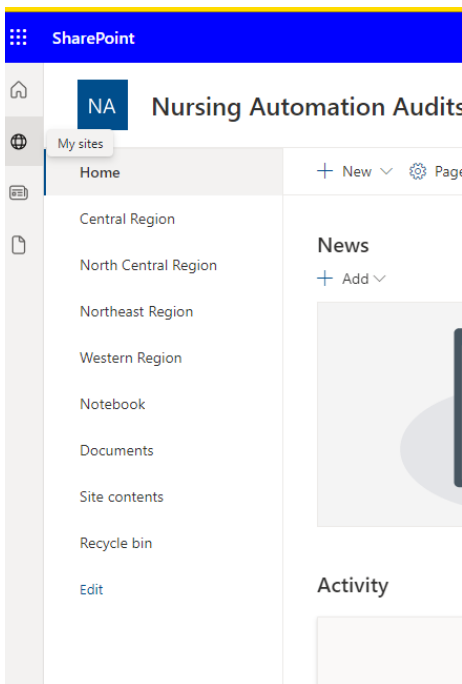
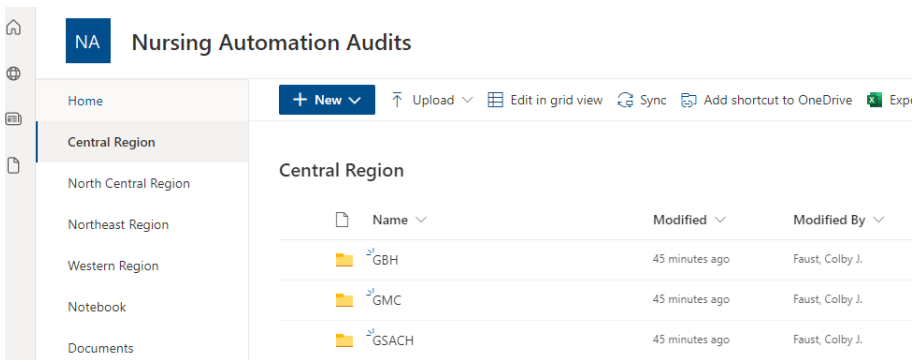
If the gap between two orders is less than 59 minutes, bot will continue the audit

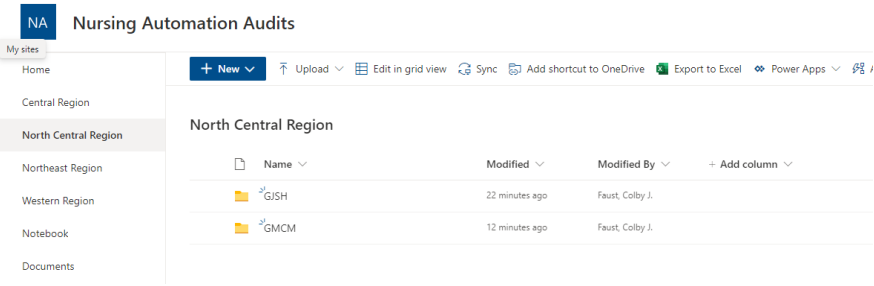
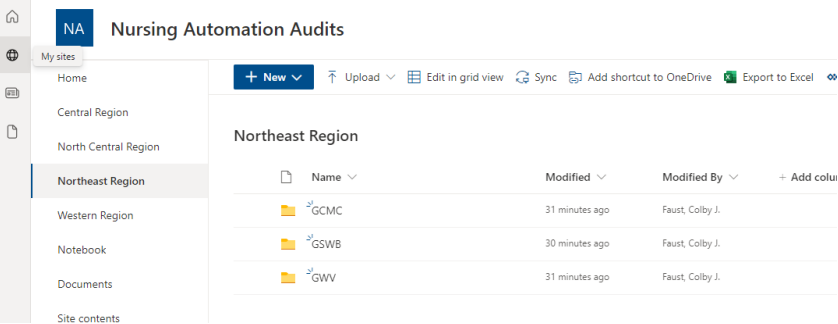
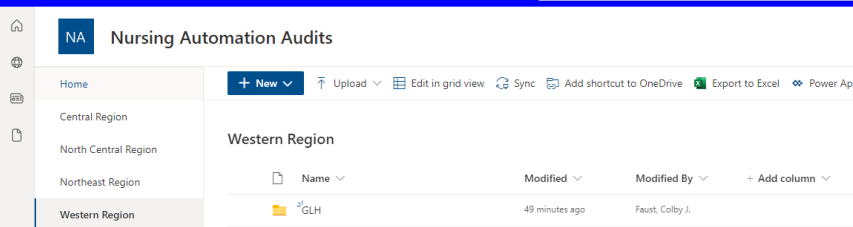
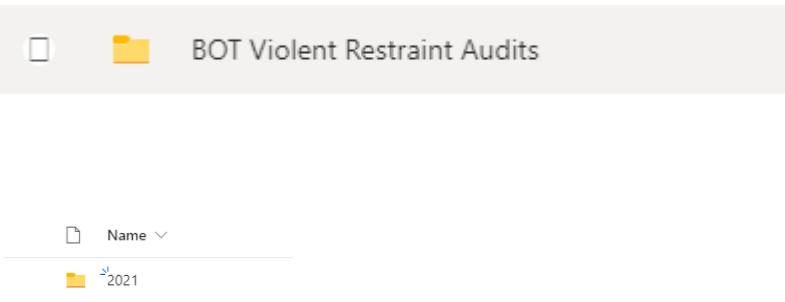
Order for Violent Date and Time		1230am					
	Date	Date	Date	Date	Date	Date	D
12am-1159pm	12am	1am	2am	3am	4am	5am	6
ADT EVENT							
Documentation Upon Initiation/ADT Event							
Document under Restraint Type (Start/Continued)							
Alternatives Before / Instead of Restraints							
Name of Provider Notified Documented			215am	315am			
Q15MIN Restraint Monitoring Completed							
Education Completed							
Care Plans Added/Reviewed							
Order Matches Restraint on Patient							
Safety Rounds							
Flowsheet User							
Documentation Per 15 mins							
Document under Restraint Type (Continued)							
Q15M Restraint Monitoring Completed							
Flowsheet User							
Documentation Per 4 hours							
Document under Restraint Type (Continued/Discontinued)							
Flowsheet User							
	Ordered	Cancelled					
Order for Violent Date and Time		515am					
	Date	Date	Date	Date	Date	Date	D
12am-1159pm	12am	1am	2am	3am	4am	5am	6
ADT EVENT							
Documentation Upon Initiation/ADT Event							
Document under Restraint Type (Start/Continued)							
Alternatives Before / Instead of Restraints							
Name of Provider Notified Documented							
Q15MIN Restraint Monitoring Completed							
Education Completed							
Care Plans Added/Reviewed							
Order Matches Restraint on Patient							
Safety Rounds							

Name of each audit form

Violent_Restraint_Audits_Campus_Unit_MRN_AdmissionDate
Violent_Restraint_Audits_GMC_GP3_IP_MRN_MMDDYYYY

UPLOADING THEM TO SHAREPOINT

Bot will click on the SP link	https://geisinger.sharepoint.com/sites/NursingAutomationAudits?e=1%3A9153a7b13f324dad9622a2fdec0db308												
Bot will pick the appropriate folder													
Bot will pick the hospital If Central: GMC, GSACH, GBH	 <table><thead><tr><th>Name</th><th>Modified</th><th>Modified By</th></tr></thead><tbody><tr><td>GBH</td><td>45 minutes ago</td><td>Faust, Colby J.</td></tr><tr><td>GMC</td><td>45 minutes ago</td><td>Faust, Colby J.</td></tr><tr><td>GSACH</td><td>45 minutes ago</td><td>Faust, Colby J.</td></tr></tbody></table>	Name	Modified	Modified By	GBH	45 minutes ago	Faust, Colby J.	GMC	45 minutes ago	Faust, Colby J.	GSACH	45 minutes ago	Faust, Colby J.
Name	Modified	Modified By											
GBH	45 minutes ago	Faust, Colby J.											
GMC	45 minutes ago	Faust, Colby J.											
GSACH	45 minutes ago	Faust, Colby J.											

Bot will pick the hospital If North Central: GJSH, GMCM	 The screenshot shows a SharePoint site titled 'Nursing Automation Audits'. The left sidebar lists 'My sites' with options: Home, Central Region, North Central Region (selected), Northeast Region, Western Region, Notebook, and Documents. The main content area shows the 'North Central Region' list with columns: Name, Modified, and Modified By. It contains two items: a folder 'GJSH' modified 22 minutes ago by Faust, Colby J., and a folder 'GMCM' modified 12 minutes ago by Faust, Colby J.
Bot will pick the hospital If North Eastern : GWV, GCMC, GSWB	 The screenshot shows the same SharePoint site, but the 'Northeast Region' list is selected. It contains three items: a folder 'GCMC' modified 31 minutes ago by Faust, Colby J., a folder 'GSWB' modified 30 minutes ago by Faust, Colby J., and a folder 'GWV' modified 31 minutes ago by Faust, Colby J.
Bot will pick the hospital If Western: GLH	 The screenshot shows the same SharePoint site, but the 'Western Region' list is selected. It contains one item: a folder 'GLH' modified 49 minutes ago by Faust, Colby J.
Each one of the main folders will have subfolders BOT violent restraint audits > Year >	 The screenshot shows a folder titled 'BOT Violent Restraint Audits'. Inside the folder, there is a subfolder named '2021'.

Month > upload the files.	 Name ▾	Modified ▾	Modified By ▾
	 01 - January	33 minutes ago	Faust, Colby J.
	 02 - February	33 minutes ago	Faust, Colby J.
	 03 - March	33 minutes ago	Faust, Colby J.
	 04 - April	33 minutes ago	Faust, Colby J.
	 05 - May	33 minutes ago	Faust, Colby J.
	 06 - June	33 minutes ago	Faust, Colby J.
	 07 - July	33 minutes ago	Faust, Colby J.
	 08 - August	33 minutes ago	Faust, Colby J.
	 09 - September	33 minutes ago	Faust, Colby J.
	 10 - October	33 minutes ago	Faust, Colby J.
	 11 - November	33 minutes ago	Faust, Colby J.
	 12 - December	33 minutes ago	Faust, Colby J.

4.5 EXCEPTIONS IN THE PROCESS FLOW

Exception	Actions	Comment
Order signed date and time in the future (one email after each run)	Bot will email users and alert them Title: IAH Violent Restraint Run MM DD YYYY HH MM Body: Bot found patients with future order date/time during MM DD YYYY HH MM run: List of: Violent_Restraint_Audits_FolderName_MRN_AdmissionDate_(YYYY_MM_DD)	Create email alerts Include: Patient Name, MRN, Department,
Bot couldnt complete the chart audit form (one email after each run)	Bot will upload a blank or incomplete chart audit form to the appropriate SP site and name the document if Bot is not able to complete the chart audit form twice in a row Title: IAH Violent Restraint Run MM DD YYYY HH MM Body:	Create email alerts Include: Patient Name, MRN, Department, when BOT failed

	IAH Violent Restraint Bot could not complete below patients during MM DD YYYY HH MM run: List of: Violent_Restraint_Audits_FolderName_MRN_AdmissionDate_(YYYY_MM_DD) Bot will continue to process these patients once it is able to process	

4.6 SYSTEM ERRORS

Error	Action	Comment
Application crash	Recover and retry 3 times	
Application is Down (Epic)	Alert business that BOT didnt run at run time (High Alert) Bot will start processing the patients once application is back up.	
If Bot fails more than 24 hours, less than 7 days	IAH will be in touch with business to work with business for future steps	
If Bot fails > 7 days	Alert business that Bot didnt run daily for 5 days, indicating how many days Bot didnt run , IAH will be in touch with business to work for future steps	

4.7 PROCESS CONTINUITY

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Prevention:

Establishing and defining what redundancies and protocols are in place to prevent failures in the process and maintain business continuity

Event	Actions (Who/what/How)	Result
When the system or application is down	- The Bot will send an email to business that the system will down and business will manually process the patients - The Bot will continue processing patients when the system is back up	
Alerts for failed patients	Bot will send emails after each run with failed patients for business to manually process these patients	

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**

Event	Actions (Who/what/How)	Result
Quality Assurance	- IAH and Business will receive emails if the BOT is down or failed to start - IAH will inform the business if Bot is down and inform of the expected recovery time	
Hypercare	- Business and IAH will review output files to minimize failed patients per run during work hours - Business and IAH will determine the reasons for failures and will implement fixes if possible	

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.

Event	Actions (Who/what/How)	Result
If the bot fails, how will it continue and resolve issue?	- IAH and Business will receive emails if the BOT is down or failed to start - IAH will inform the business if Bot is down and inform of the expected recovery time	

5. Technical Details

Item	Description	Comment
Robot Type	Attended, Unattended, Mix	
Orchestrator used?	Yes/No	Cloud or On-Premise/Version
UiPath version used	2019.10	

6. Reporting

Report Type	Details	Distribution List
Application is Down (Epic)	Whole process failed: Alert business that BOT didn't run at run time (High Alert) Bot will start processing the patients once application is back up. Subject: *Nursing –Violent Chart Audits Process Failed* Body: The Nursing Violent Restraint Chart Audits Process Failed to run at MM:DD:YYYY HH:MM AM/PM. The bot will process the patients during the next run.	
Bot couldn't complete the chart audit form for a patient	Bot will upload the existing blank or incomplete chart audit form to the appropriate SP site and name the document if Bot is not able to complete the chart audit form twice in a row Subject: * Nursing – Nursing –Violent Chart Audits - Admission Date_ (YYYY/MM/DD)_MRN_Department*	Create email alerts Include: Patient Name, MRN,

(one email after each run)	Body: MANUAL_REVIEW_NEEDED_ Admission Date_ (YYYY/MM/DD)_MRN_Department (how many times Bot failed this patient) The Nursing –Violent Restraint Chart Audits Process Failed to run at MM:DD:YYYY HH:MM AM/PM for MRN.	Department, when BOT failed
Order signed date and time in the future (one email after each run)	Bot will email users and alert them Title: IAH Violent Restraint Run MM DD YYYY HH MM Body: Bot found patients with future order date/time during MM DD YYYY HH MM run: List of: Violent_Restraint_Audits_FolderName_MRN_AdmissionDate_(YYYY_MM_DD)	Create email alerts Include: Patient Name, MRN, Department ,
Bot couldnt complete the chart audit form (one email after each run)	Bot will upload a blank or incomplete chart audit form to the appropriate SP site and name the document if Bot is not able to complete the chart audit form twice in a row Title: IAH Violent Restraint Run MM DD YYYY HH MM Body: IAH Violent Restraint Bot could not complete below patients during MM DD YYYY HH MM run: List of: Violent_Restraint_Audits_FolderName_MRN_AdmissionDate_(YYYY_MM_DD) Bot will continue to process these patients once it is able to process	Create email alerts Include: Patient Name, MRN, Department , when BOT failed
If Bot fails more than 24 hours, less than 7 days	Alert business that Bot didnt run daily for 5 days, indicating how many days Bot didnt run , IAH will be in touch with business to work for future steps	
If Bot fails > 7 days ago	Alert business that Bot didnt run daily for 5 days, indicating how many days Bot didnt run , IAH will be in touch with business to work for future steps	

7. Environment Details

Application	Development Stage	Environment	Access Type	Access Key/Credential
Epic	Development	<Epic_Dev>	IAHAUDITS and password	Username: <username>
	Test	<Epic_Test>	IAHAUDITS and password	Username: <username>
Outlook	Development /Test/UAT/Prod	<Environment Name>	Email account and password	Email: iahbotadprod***@geisinger.edu
Network Folders	Test/Prod	Nursing_Violent Restraint_Chart Audits_Test Nursing_Violent Restraint_Chart Audits_Prod		Test modify
SP		https://geisinger.sharepoint.com/sites/NursingAutomationAudits?e=1%3A9153a7b13f324dad9622a2fdec0db308		

8. Assumptions

Assumption	Impact
Epic is available	If Epic is down then robot cannot start

9. ADDITIONAL SOURCES OF PROCESS DOCUMENTATION

Type	Name	Link	Comments
N/A			

10. Appendix

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