



Process Definition Document



PDD [005] - PASS Self-Pay with Potential Available Coverage WQ

TABLE OF CONTENTS

I.	INTRODUCTION	4
1.1	Purpose.....	4
1.2	Objectives.....	4
1.3	Key Contacts.....	4

1.4	Minimum Pre-requisites for the Automation.....	4
II.	AS IS Process description.....	5
2.1	Process Overview.....	5
2.2	Applications Used	6
2.3	AS IS Process Map.....	6
2.3.1	High Level Process Map	Error! Bookmark not defined.
2.3.2	Detailed Level Process Map.....	Error! Bookmark not defined.
2.4	Process Statistics	7
2.5	Detailed As Is Process Actions	7
2.6	Exceptions Handling.....	24
2.7	Input Data Description	24
III.	TO BE Process description.....	25
3.1.	Detailed TO BE Process Map	25
3.2.	Parallel Initiatives.....	27
3.3.	In Scope For RPA.....	27
3.4.	Out Of Scope for RPA	27
3.5.	Exceptions Handling.....	28
3.5.1.	Known Business Exceptions	28
3.5.2	Unknown Business Exceptions	28
3.6.	Applications Errors & Exceptions Handling.....	28
3.6.1.	Known Applications Errors and Exceptions.....	28
3.6.2.	Unknown Applications Errors and Exceptions.....	28
3.7.	Reporting.....	29
IV.	Other	29
4.1.	Additional sources of process documentation	29

I. INTRODUCTION

3.1. Purpose

The Process Definition Document outlines the business process chosen for automation. The document describes the sequence of actions performed as part of the business process, the conditions and rules of the process prior to automation (**AS IS**) as well as the new sequence of actions that the process will follow as a result of preparation for automation (**TO BE**).

The PDD is a communication document between:

- The RPA Business Analyst and the SME/Process Owner. The goal is to ensure that the RPA Business Analyst has the correct understanding of the process and has represented it accurately.
- The RPA Business Analyst and the Development team (represented by the Solution Architect and RPA Development Lead). The goal is to ensure that the process is documented appropriately and to a sufficient level of detail so that the Solution Architect can then create the solution based on the PDD content.

3.2. Objectives

The business objectives and benefits expected by the Business Process Owner after automation of the selected business process are:

- Increase insurance claim submission on accounts within the Self-Pay w/
Potential Available Coverage WQ

3.3. Key Contacts

Add here any stakeholders that need to be informed or to approve changes to the process:

Role	Name
Project Director	Adrienne Leistner
Sponsor	Andrew Bartlett
Business Analyst	Chandi Rae Soros
RPA Developer	Chandi Rae Soros

3.4. Minimum Pre-requisites for the Automation

- a) Filled in Process Definition Document
- b) Test Data to support development

- c) User access and user accounts creations (licenses, permissions, restrictions to create accounts for robots)
- d) Credentials (user ID and password) required to logon to machines and applications

II. AS IS PROCESS DESCRIPTION

In this section the Business Analyst will document the process. This section will serve as the starting point for the re-engineering and automation effort.

3.5. Process Overview

Section contains general information about the process before automation.

Item	Description/Answer
Process Full Name	RPA [005] - PASS Self-Pay with Potential Available Coverage WQ
Process Area	ERC
Department	PASS
Short Description (operation, activity, outcome)	Bot will open Self-Pay with Potential Available Coverage WQ [84897] and filter by primary payor. The bot will review accounts where there is a self-pay balance and available coverage on file that is not yet attached. The bot will navigate to the coverages tab and edit the filing order to add the coverage which will automatically send a claim for the HAR.
Role(s) required in applications to perform the process	PASS PAR 2 WQ Team
Process schedule and frequency	Every business day
Number of times the process is ran by selected frequency	Est. 25x
Process execution time	5-15minutes on average
Process Restrictions	N/A

Peak Period (s)	N/A
Peak Volume Approximate increase	N/A
Number of persons performing the process	2
Expected Volume increase during next periods	Implementation of insurance discovery may contribute to future increase of WQ volumes.
Percentage Un-handled exceptions	N/A
Input data description	EPIC – Hospital Acct Lookup for the HAR
Output Data description	Completion of documentation drops the account from the WQ

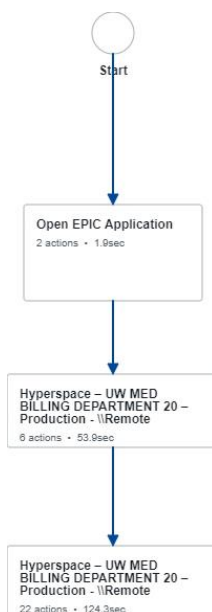
*Add more rows to the table to include relevant data for the automation process. No fields should be left empty. Use "n/a" for the items that don't apply to the selected business process.

3.6. Applications Used

Application Name	Version	Application Language	Thin/Thick Client	Environment/ Access method	Comments
EPIC	May 2023	Unknown	Thin Client	PROD	

*Add more rows to the table to include the complete list of applications.

3.7. AS IS Process Map



3.8. Process Statistics

High Level statistics

Processes	Windows	Actions	Mouse clicks	Keys pressed	Text entries	Hotkeys used	Time
2	2	30	27	2	1	0	3 min. 0 sec.

Detailed statistics

Window name	Mouse clicks	Text entries	Key pressed
Cortana	1	1	2
Hyperspace - UW MED BILLING DEPARTMENT 20 - Production - \\Remote	26	0	0

3.9. Detailed As Is Process Actions

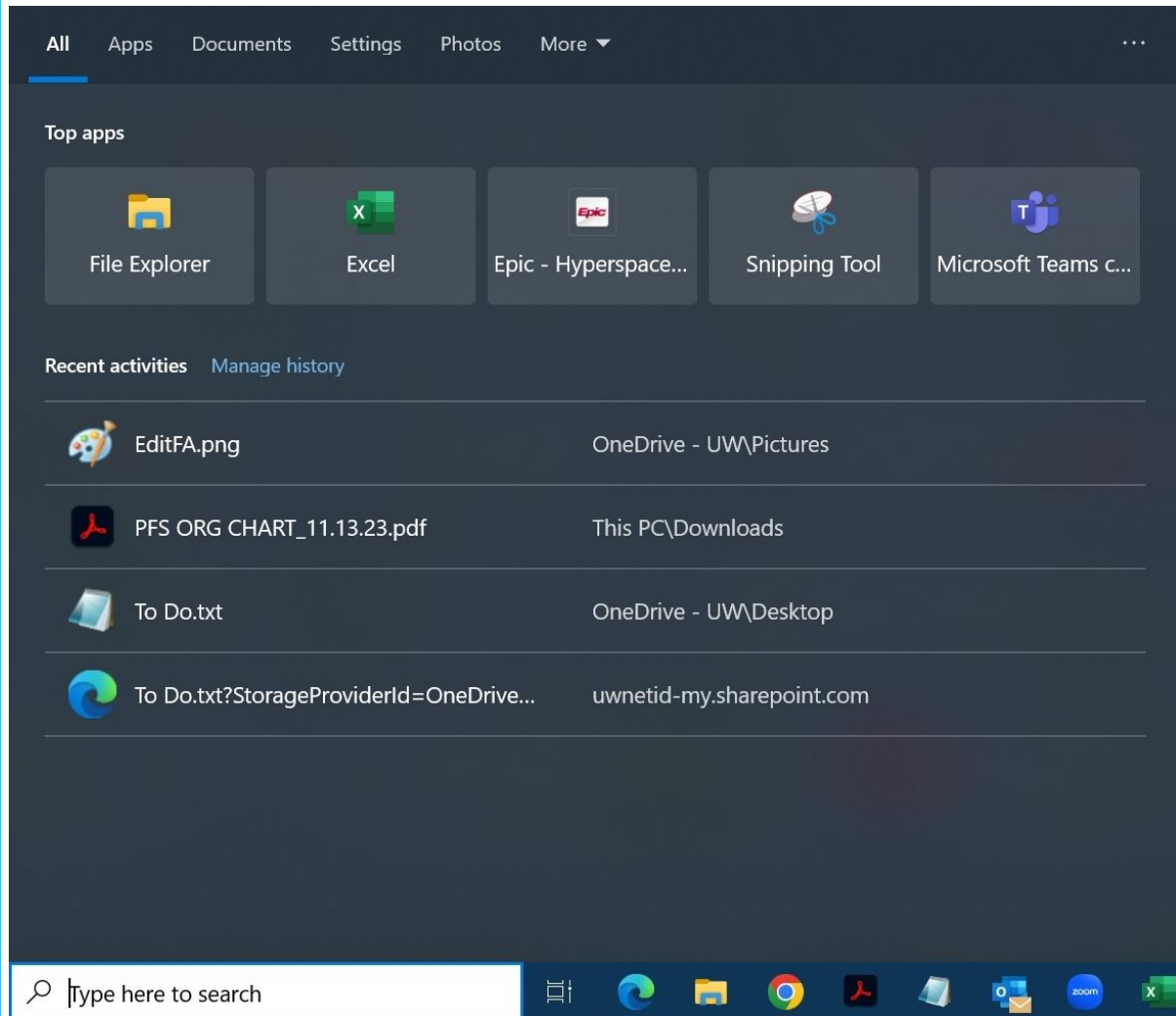
1	Open EPIC Application
	Est. time: 1.9 sec.

1.1 Type Into

Type Into: EPIC

Est. time:
0.2 sec.

Action:
Keyboard
Input

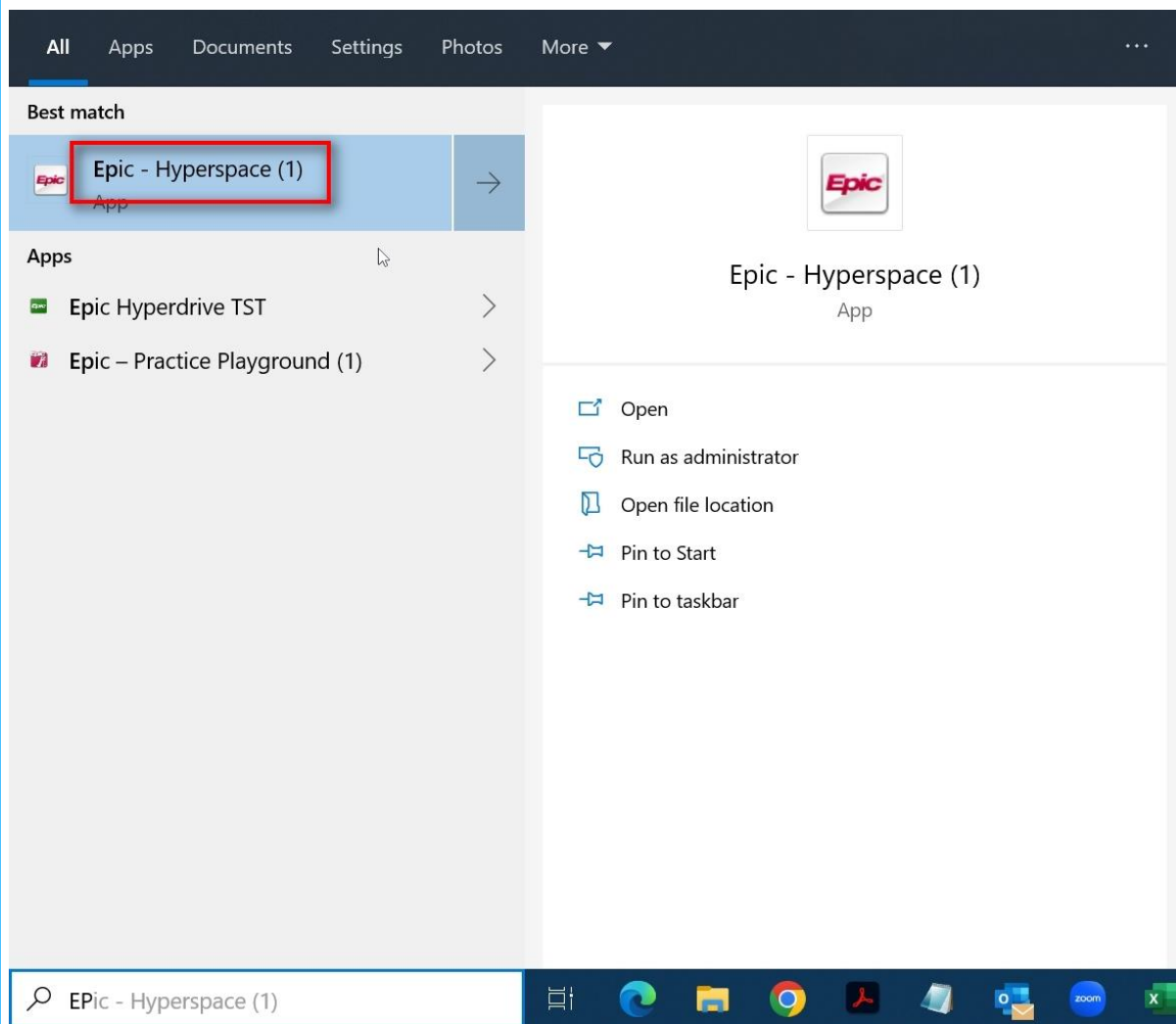


1.2 Open EPIC Application

Open EPIC Application

Est.
time:
1.7
sec.

Action:
Click



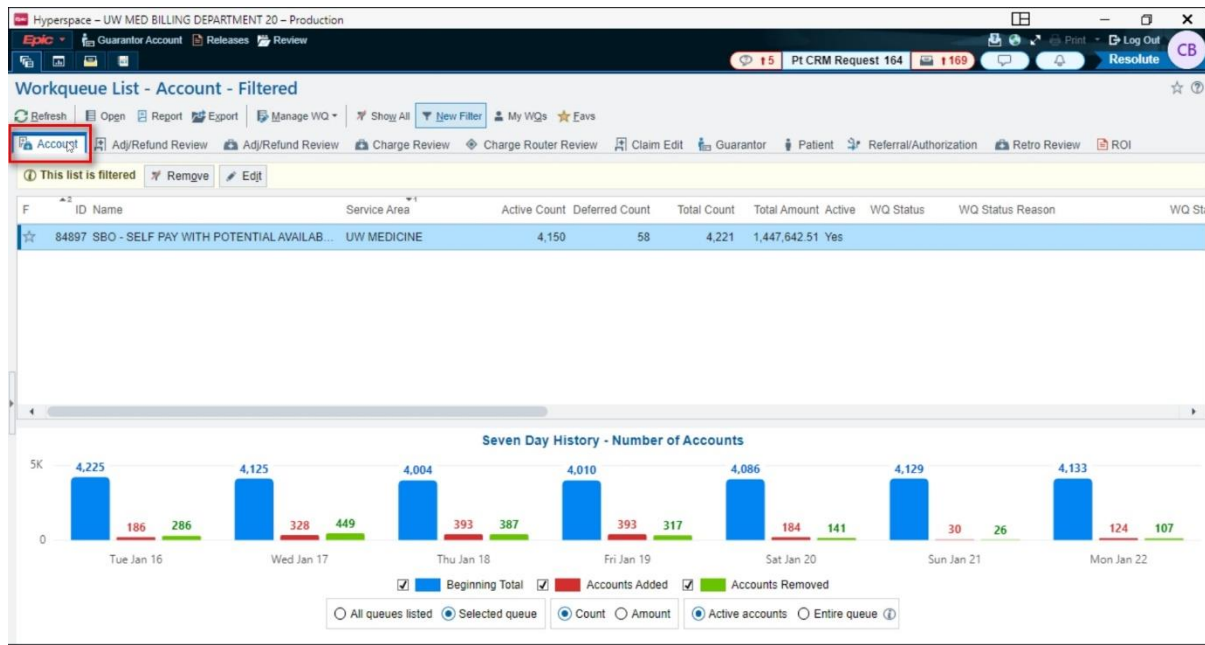
2 Hyperspace - UW MED BILLING DEPARTMENT 20 - Production - \\Remote

Est. time: 53.9 sec.

2.1 Navigate to WQ Accounts

Est. time: 9.9 sec.

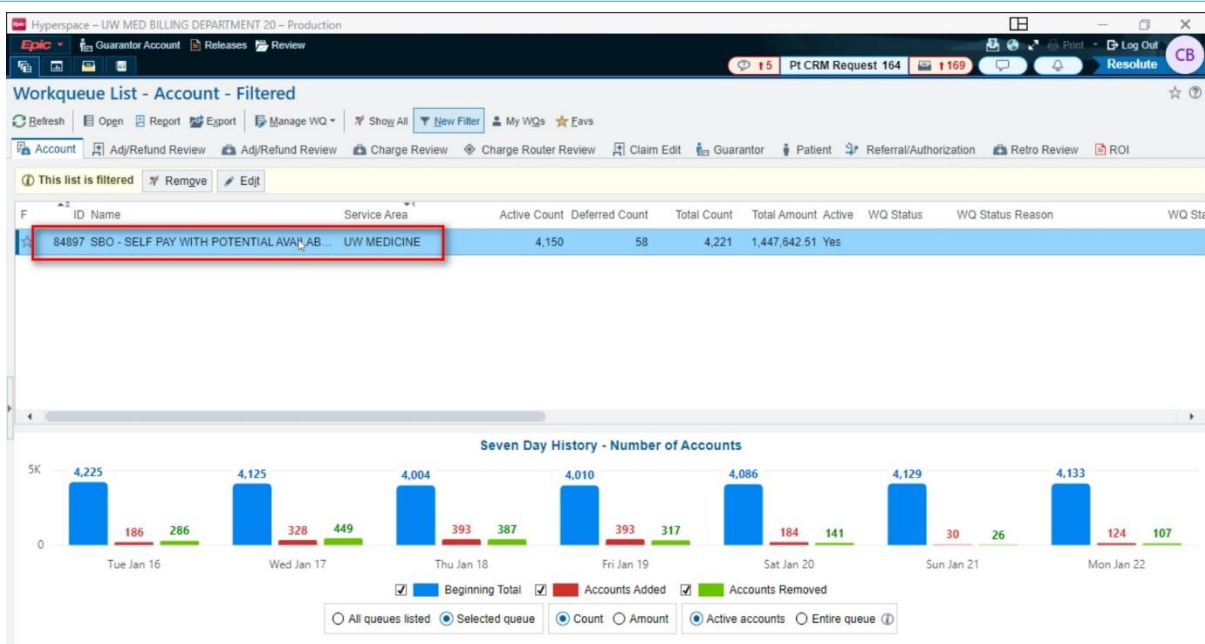
Action:
Click



2.2 Open Self-Pay w/ Potential Available Coverage WQ

Est. time: 2.4 sec.

Action:
Double Click



2.3

Est. time: 12.3 sec.

Hyperspace - UW MED BILLING DEPARTMENT 20 - Production

Account WQ - 84897

Robert T. Hendrix "Rob"
Male, 64 years, 5/16/1959
MRN: U5410198
UHFCC
Acct ID: 702597690
Fin Class: Self-Pay
BILLED
Pronoun: he/him/his
ALIVE
Outstanding Balance: HB
Balance Due: \$0.00, PB Balance
Due: \$0.00, Self-Pay Bal Due:
\$0.00
Discharge Dept Name: FHCC
MELANOMA RENAL CELL
ONCOLOGY
OUTPATIENT
1/10/2024
UWMC PB FHCC
BALANCES
Total: 205.66
Pre: 0.00
Inc: 0.00
SP: 205.66
GUARANTOR
Robert T. Hendrix "Rob"
[5842901]
Personal/Family - Self
Reason Party: Self - Total

Workqueue Acct Summary Guar Summary Doc Review Prof Tx Inquiry Liability Buckets Coverages Coding Abstracting Code Integration History Correspondence List

Account WQ SBO - SELF PAY WITH POTENTIAL AVAILABLE COVERAGE [84897] Last refreshed: 1/22/2024 2:08:23 PM

Refresh Workqueue Filter Account Activities Complete Acct Defer Transfer Collect Payment Patient Refund Go To

Active (Total: 4,150; Amount: 1,362,014.05) Deferred (Total: 58; Amount: 15,564.63) Completed (Total: 13; Amount: 70,063.83)

A	HAR Id	Acct Balance	SPFU Level	Guarantor Name	Primary Payor	Current Cove	Eligible Plan not on Acct	On Pmt Plan?	Patient Name	Guar Bal	Days On WC
	702561508	85.68		ANEAS PRIETO, RE...			GENERIC UNLISTED	No	ANEAS PRI...	37,600.94	0
	702599264	109.27		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702586125	18.55		ANEAS PRIETO, RE...			GENERIC UNLISTED	No	ANEAS PRI...	37,600.94	0
	702580378	18.55		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702597688	24.50		TIGHE, CARLY			CIGNA	No	TIGHE, CARLY	26,451.10	0
	702597690	205.66		HENDRIX, ROBERT ...			FHCC HOLDING FUNDS AD...	No	HENDRIX, R...	10,391.07	0
	702592374	18.55		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702207704	1,026.04		MANRIQUEZ, ELSA			GA/MEDICAL CARE SERVIC...	No	MANRIQUE...	8,642.81	0
	702599694	31.60		STEINLAGE, ELIZAB...			HEALTHPARTNERS CIGNA	No	STEINLAGE...	2,604.77	0
	702604320	139.23		EILBES, CHRISTIAN...			OUT OF STATE SELF INSUR...	No	EILBES, CHR...	29,964.82	0
	702518466	293.80		QUEBRAL, CHRIST...			GEHA AETNA SIGNATURE A...	No	QUEBRAL, C...	1,089.40	0
	702281336	69.23		PRESTON, MONICA ...			HB THE EMPIRE PLAN BCB...	No	PRESTON, M...	573.61	0
	702607219	176.33		BARGREEN, AUTU...			REGENCE PREFERRED/PPO	No	BARGREEN...	12,733.78	0
	702608865	18.55		TOUPS, CASEY LEE			AUTO INS GENERIC	No	TOUPS, CAS...	42,324.14	0
	702586978	122.40		ANEAS PRIETO, RE...			GENERIC UNLISTED	No	ANEAS PRI...	37,600.94	0

Action:
Click

2.4 Filter by Primary Payor

(Arrow will be pointing up)

Hyperspace - UW MED BILLING DEPARTMENT 20 - Production

Account WQ - 84897

Robert T. Hendrix "Rob"
Male, 64 years, 5/16/1959
MRN: U5410198
UHFCC
Acct ID: 702597690
Fin Class: Self-Pay
BILLED
Pronoun: he/him/his
ALIVE
Outstanding Balance: HB
Balance Due: \$0.00, PB Balance
Due: \$0.00, Self-Pay Bal Due:
\$0.00
Discharge Dept Name: FHCC
MELANOMA RENAL CELL
ONCOLOGY
OUTPATIENT
1/10/2024
UWMC PB FHCC
BALANCES
Total: 205.66
Pre: 0.00
Inc: 0.00
SP: 205.66
GUARANTOR
Robert T. Hendrix "Rob"
[5842901]
Personal/Family - Self
Reason Party: Self - Total

Workqueue Acct Summary Guar Summary Doc Review Prof Tx Inquiry Liability Buckets Coverages Coding Abstracting Code Integration History Correspondence List

Account WQ SBO - SELF PAY WITH POTENTIAL AVAILABLE COVERAGE [84897] Last refreshed: 1/22/2024 2:08:53 PM

Refresh Workqueue Filter Account Activities Complete Acct Defer Transfer Collect Payment Patient Refund Go To

Active (Total: 4,150; Amount: 1,362,014.05) Deferred (Total: 58; Amount: 15,564.63) Completed (Total: 13; Amount: 70,063.83)

A	HAR Id	Acct Balance	SPFU Level	Guarantor Name	Primary Payor	Current Cove	Eligible Plan not on Acct	On Pmt Plan?	Patient Name	Guar Bal	Days On WC
	702518466	293.80		QUEBRAL, CHRIST...			GEHA AETNA SIGNATURE A...	No	QUEBRAL, C...	1,089.40	0
	702604320	139.23		EILBES, CHRISTIAN...			OUT OF STATE SELF INSUR...	No	EILBES, CHR...	29,964.82	0
	702599694	31.60		STEINLAGE, ELIZAB...			HEALTHPARTNERS CIGNA	No	STEINLAGE...	2,604.77	0
	702207704	1,026.04		MANRIQUEZ, ELSA			GA/MEDICAL CARE SERVIC...	No	MANRIQUE...	8,642.81	0
	702592374	18.55		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702597690	205.66		HENDRIX, ROBERT ...			FHCC HOLDING FUNDS AD...	No	HENDRIX, R...	10,391.07	0
	702597688	24.50		TIGHE, CARLY			CIGNA	No	TIGHE, CARLY	26,451.10	0
	702580378	18.55		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702586125	18.55		ANEAS PRIETO, RE...			GENERIC UNLISTED	No	ANEAS PRI...	37,600.94	0
	702599264	109.27		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702561508	85.68		ANEAS PRIETO, RE...			GENERIC UNLISTED	No	ANEAS PRI...	37,600.94	0
	702525481	18.55		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702519018	109.27		WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702493383	18.55	Level 1	WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0
	702449397	18.55	Level 1	WRIGHT, DAVID MIC...			UHC APPLE HEALTH	No	WRIGHT, DA...	139,210.14	0

Action:
Click

2.5 Open Patient Account

Account WQ SBO - SELF PAY WITH POTENTIAL AVAILABLE COVERAGE [84897] Last refreshed: 1/22/2024 2:09:14 PM

A. HAR ID	Acct Balance	SPFU Level	Guarantor Name	Primary Payor	Current Cove...	Eligible Plan not on Acct	On Pmt Plan?	Patient Name	Guar Bal	Days On WC
99408508	304.59	Level 4	KUCKOWICZ,DALL...			BS OF CALIFORNIA	No	KUCKOWICZ...	694.29	116
94692559	739.30		WILSON,JADE ELIZ...			PREMERA GENERIC	No	WILSON,JA...	16,185.18	102
94619754	745.80		WILSON,JADE ELIZ...			PREMERA GENERIC	No	WILSON,JA...	16,185.18	102
97635123	745.03	Level 1	SIMMONS,TIMOTH...			ALLSTATE	No	SIMMONS,TI...	7,963.80	92
700066775	270.62	Level 3	GERKE,EMILY ANNE			REGENCE PREFERRED/PPO	No	GERKE,EMI...	376.72	86
700143896	521.52	Level 3	REEVES,AMBER VI...			CRIME VICTIMS	No	REEVES,AM...	8,428.59	85
700143956	1,049.03		SANCHEZ,EMANUEL			HNFS TRICARE WEST REGI...	No	SANCHEZ,E...	1,049.03	85
99967904	205.66	Level 3	WIGGINS,LESLIE C...			LABOR AND INDUSTRIES WC	No	WIGGINS,LE...	1,064.63	84
700212009	521.52	Level 3	BLANTON,SHAWN ...			LABOR AND INDUSTRIES WC	No	BLANTON,S...	845.92	82
700211836	389.60	Level 3	TAAVAO,SARAH			CRIME VICTIMS	No	MC FARLAN...	389.60	80
700144099	367.71	Level 3	WICK,GABRIEL			CRIME VICTIMS	No	WICK,GABR...	67,623.89	78
700144370	17.15	Level 2	WICK,GABRIEL			CRIME VICTIMS	No	WICK,GABR...	67,623.89	78
700148163	521.52	Level 2	WICK,GABRIEL			CRIME VICTIMS	No	WICK,GABR...	67,623.89	78
700302977	34.30	Level 2	WICK,GABRIEL			CRIME VICTIMS	No	WICK,GABR...	67,623.89	78
700497339	243.80	Level 2	WICK,GABRIEL			CRIME VICTIMS	No	WICK,GABR...	67,623.89	73

Action:
Double
Click

2.6 Identify "There are no insurance buckets for this account" message under Insurance BA

As long as this message appears, the bot will continue. Once the bot reaches accounts where previous insurance is billed, this message will not appear and the bot will end the process.

Liability Buckets - 1 of 4151 Active Accounts

Status	Chgs	Prv Cred	Pmts	Adjs	Trans Out	Balance
Created	304.59	0.00	0.00	0.00	-304.59	0.00

Insurance

There are no insurance buckets for this account.

Status	Chgs	Prv Cred	Pmts	Adjs	Trans Out	Balance
Outstanding	304.59	0.00	0.00	0.00	0.00	304.59

Action:
Click

3 Hyperspace – UW MED BILLING DEPARTMENT 20 – Production - \\Remote

Est. time: 2 min. 4 sec.

3.1 Navigate to Coverages Tab

Once the "There are no insurance buckets for this account" message has been validated, the bot will navigate to the coverages tab.

Est. time: 1.4 sec.

Action: Click

The screenshot displays the Epic Hyperspace interface for account WQ-84897. The 'Coverages' tab is highlighted in the navigation bar. The main content area shows 'Liability Buckets - 1 of 4151 Active Accounts'. The 'Insurance' section indicates 'There are no insurance buckets for this account.' The 'Self-Pay' section shows a balance of 304.59.

Status	Chgs	Prv Cred	Pmts	Adjs	Trans Out	Balance
Created	304.59	0.00	0.00	0.00	-304.59	0.00
Outstanding	304.59	0.00	0.00	0.00	0.00	304.59

3.2 Identify "There are no valid professional coverages associated with this account"

"There are no valid professional coverages associated with this account" This message is the anchor/trigger that will signal the bot to continue the next step. There is an alternate 'do not bill insurance' message with an exception to move on. This will be demonstrated later. In the current example, the bot will edit the filing order.

Action:
Click

3.3 Click 'Edit Filing Order'

Action:
Click

3.4 Click green plus icon to attach available coverage

Action:
Click

Edit Visit Coverages

Visit Coverages (User Overridden) Undo Changes Show Default F/O Use Default

No Visit Coverage Assigned
Add a coverage from the Unused Coverages list if you want to bill insurance.

Unused Coverages

Coverage	Subscriber	Insurance ID	Effective Dates
E-BCBS OUT OF AREA/BS OF CALIFORNIA	Dallas Catherine Kuckowicz	XED911348440	01/01/2023 -

Visit Transactions Collapsible All

Posted Charges Total Count: 1 Total Amount: 304.59

Current Primary Coverage
Self-Pay

Tx #	Service Date	Description	Amount	Insurance Bal	Self-Pay Bal	Timely Filing	Primary Claim?
2	09/22/2023	99283 (CPT®) - PR EMERGENCY DEPARTMEN...	304.59	0.00	304.59	—	No claim

Accept Cancel

3.5 Reason Code: 4, Self-Pay to Coverage Press 'Enter'

Action:
Special
Key

Edit Visit Coverages

Visit Coverages Undo Changes Show Default F/O Use Default

F/O	Coverage	Subscriber	Insurance ID	Effective Dates
1	E-BCBS OUT OF AREA/BS OF CALIFORNIA	Dallas Catherine Kuckowicz	XED911348440	01/01/2023 -

Reason 4 Comment

Title Self-Pay to Coverage Number 4

Repost Amount: 304.59 Total Count: 1 Total Amount: 304.59

Current Primary Coverage Repost to Coverage
Self-Pay BCBS OUT OF AREA / BS OF CALIFORNIA

Tx #	Service Date	Description	Amount	Insurance Bal	Self-Pay Bal	Timely Filing	Primary Claim?
2	09/22/2023	99283 (CPT®) - PR EMERGENCY DEPARTMEN...	304.59	0.00	304.59	243 days	No claim

Accept Cancel

3.6 Type Into Comment Box

Visit Coverages

Undo Changes Show Default F/O Use Default

F/O	Coverage	Subscriber	Insurance ID	Effective Dates
1	E-BCBS OUT OF AREA/BS OF CALIFORNIA	Dallas Catherine Kuckowicz	XED911348440	01/01/2023 -

Reason: Self-Pay to Coverage

Comment: **RPA TX**

Visit Transactions

Posted Charges: Repost Amount: 304.59 Total Count: 1 Total Amount: 304.59

Tx #	Service Date	Description	Amount	Insurance Bal	Self-Pay Bal	Timely Filing	Primary Claim?
2	09/22/2023	99283 (CPT®) - PR EMERGENCY DEPARTMEN...	304.59	0.00	304.59	243 days	No claim

Accept Cancel

Action:
Special
Key

RPA
System
Action
Taken

3.7 Click 'Accept'

Visit Coverages

Undo Changes Show Default F/O Use Default

F/O	Coverage	Subscriber	Insurance ID	Effective Dates
1	E-BCBS OUT OF AREA/BS OF CALIFORNIA	Dallas Catherine Kuckowicz	XED911348440	01/01/2023 -

Reason: Self-Pay to Coverage

Comment: RPA TST

Visit Transactions

Posted Charges: Repost Amount: 304.59 Total Count: 1 Total Amount: 304.59

Tx #	Service Date	Description	Amount	Insurance Bal	Self-Pay Bal	Timely Filing	Primary Claim?
2	09/22/2023	99283 (CPT®) - PR EMERGENCY DEPARTMEN...	304.59	0.00	304.59	243 days	No claim

Accept Cancel

Action:
Click

3.8 Navigate to 'Liability Buckets'

The screenshot shows the Epic Hyperspace interface for a patient account. The top navigation bar includes tabs like Workqueue, Acct Summary, Guar Summary, Doc Review, Prof Tx Inquiry, **Liability Buckets**, Coverages, Coding, Abstracting, Code Integration, History, and Correspondence List. The 'Liability Buckets' tab is highlighted. Below the navigation bar, the page title is 'Coverages - 1 of 4151 Active Accounts'. The left sidebar shows patient information for Dallas C. Kuckowicz, including gender, date of birth, MRN, and account ID. The main content area displays 'Coverages Attached to This Visit' with a list of coverages, including '(1) BCBS OUT OF AREA [55116] - BS OF CALIFORNIA [3616]'. Below this, there are sections for 'Primary Payer', 'Subscriber Info', 'Alternate Payors', and 'Other Coverages for the Patient'.

Action:
Click

3.9 Hit Refresh

Page will sometimes auto refresh but the bot can hit refresh?

The screenshot shows the Epic Hyperspace interface for a patient account. The top navigation bar includes tabs like Workqueue, Acct Summary, Guar Summary, Doc Review, Prof Tx Inquiry, **Liability Buckets**, Coverages, Coding, Abstracting, Code Integration, History, and Correspondence List. The 'Liability Buckets' tab is highlighted. Below the navigation bar, the page title is 'Liability Buckets - 1 of 4151 Active Accounts'. The left sidebar shows patient information for Dallas C. Kuckowicz, including gender, date of birth, MRN, and account ID. The main content area displays 'Liability Buckets' with a list of buckets, including 'Prebilled', 'Insurance', and 'Self-Pay'. The 'Refresh' button is highlighted in the top left corner of the main content area.

Action:
Click

3.10 Click 'Account Activities'

The screenshot shows the Epic Hyperspace interface for a patient account. The left sidebar contains patient information for Dallas C. Kuckowicz, including demographics, insurance details, and financial status. The main content area is titled 'Liability Buckets - 1 of 4151 Active Accounts'. Within this section, the 'Account Activities' tab is highlighted with a red box. Other tabs visible include 'Prebilled', 'Insurance', and 'Self-Pay'. The interface also shows various action buttons like 'Refresh', 'Complete Acct', 'Defer', 'Transfer', 'Collect Payment', and 'Patient Refund'.

Action:
Click

3.11 Select 'Account Note - PASS'

The screenshot shows the Epic Hyperspace interface with the 'Account Act' tab selected. The main content area displays a list of activities under the heading 'Hospital Account Activity'. A search bar is present at the top. Below the search bar, there are two sections: 'Favorites' and 'Recent'. In the 'Recent' section, the activity 'Account Note-PASS [3411]' is highlighted with a red box. Other activities listed include '1 Initiate Billing', '2 Override DNB Warnings', '3 Process Late Charges', '4 Undo All Billing', 'Modify Contested Status', 'Update Payment Plan', 'CBA Adjusted contractual w/o per COB PB', 'Change Self-Pay Follow-Up Level', 'Set Billing Indicator', 'Open Account', 'Send to Bad Debt', 'Add Billing Indicator - Part A to Part B Rebilling', 'Send Letter', 'Modify Stop Bill', and 'Add to Workqueue'.

Action:
Click

3.12 Type Into Note Field

Bot will note HAR# and system actions.

The screenshot shows the Epic Hyperspace interface for a patient account. The left sidebar displays patient information for Dallas C. Kuckowicz, including demographics, insurance, and financial details. The main area shows the 'Account Note-PASS [3411]' form. The 'Add Note' section has a text area where the text 'RPA WQ TST - HAR#99408508 billed to available coverage on file' is entered. Below the text area is a 'Summary' field. At the bottom, the 'Account Workqueue Action' section contains buttons for 'Complete', 'Defer', 'Transfer', and 'No Action'.

Action:
Click

3.13 Type Into Summary field

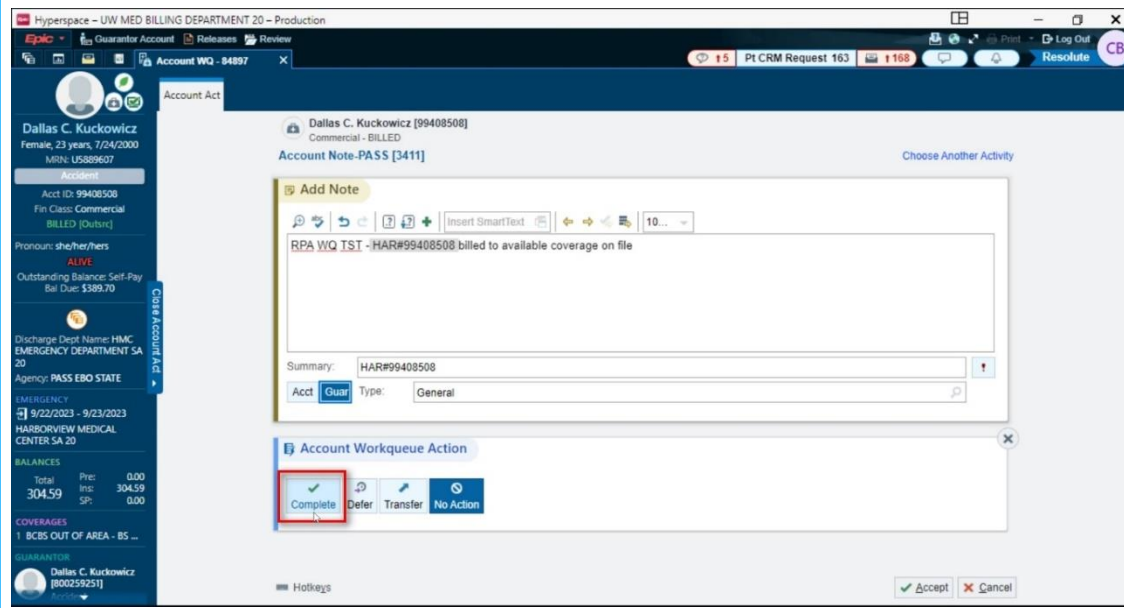
Paste/Type into: HAR# and click 'Guar'

This screenshot is similar to the previous one, but the 'Summary' field now contains the text 'HAR#99408508'. The 'Guar' button in the 'Account Workqueue Action' section is highlighted with a red box, indicating the next step in the process.

Action:
Click

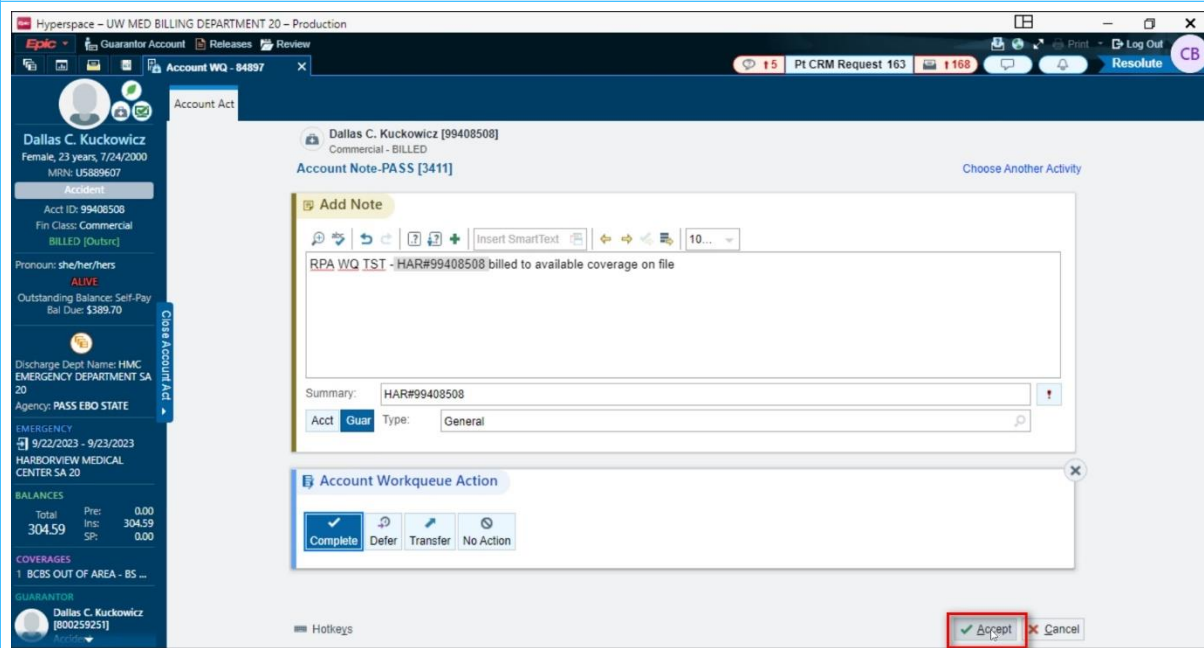
3.14 Click 'Complete'

This will remove the account/complete acct from WQ



Action:
Click

3.15 Click 'Accept'



Action:
Click

3.16 Click 'Close Account Note'

(this may not be applicable in automation based on screen size and how EPIC displays pages)

The screenshot shows the EPIC Hyperspace interface for a patient named Jade E. Wilson. The left sidebar contains a list of account actions, with 'Close Account Act' highlighted in a red box. A tooltip below the button indicates the keyboard shortcut: 'Close Account Act (Alt+Shift+Right Arrow)'. The main content area displays 'Hospital Account Activity' with a list of favorites and recent actions.

Action:
Click

3.17 Identify Message "There are no insurance buckets for this account."

Once the previous account is completed, the next account will appear and already be in the correct initiation area.

The screenshot shows the EPIC Hyperspace interface for a patient named Emily A. Gerke. The 'Liability Buckets' section is active, displaying a table with columns: Status, Chgs, Prv Cred, Pmts, Adjs, Trans Out, and Balance. The 'Insurance' section is highlighted in a red box, and a message below it states: 'There are no insurance buckets for this account.' The 'Self-Pay' section is also visible, showing a status of 'Outstanding' with a balance of 270.62.

Action:
Click

3.18 Click 'Coverages'

Action: Click

Liability Buckets - 3 of 4150 Active Accounts

Status	Chgs	Prv Cred	Pmts	Adjs	Trans Out	Balance
Created	386.60	0.00	0.00	0.00	-386.60	0.00
Outstanding	386.60	0.00	0.00	-115.98	0.00	270.62

3.19 Identify message: "There are no valid professional coverages associated with this account" - or if "This Account has been marked as "Do not Bill Insurance"" then skip account

Exception/Do not bill

Action: Click

Coverages - 3 of 4150 Active Accounts

Coverages Attached to This Visit (Overridden)

This account has been marked as "Do not Bill Insurance".

Other Coverages for the Patient

(1) REGENCE BLUE SHIELD [44267] - REGENCE PREFERRED/PPO [3313] Eligible

Subscriber Info GERKE, EMILY ANNE | DOB: 06/21/1977 | Subscriber ID: ZLF160043981 | SSN: 539-13-5303

3.20 Navigate to 'Liability Bucket'

Action:
Click

The screenshot shows the Epic Hyperspace interface for account 84897. The 'Liability Buckets' tab is selected in the top navigation bar. The main content area displays 'Coverages - 3 of 4150 Active Accounts' and 'Coverages Attached to This Visit (Overridden)'. A red box highlights the 'Liability Buckets' tab in the top navigation bar.

3.21 Click 'Next' Icon

This will move on to the next account in the WQ

Action:
Click

The screenshot shows the Epic Hyperspace interface for account 84897. The 'Liability Buckets' tab is selected in the top navigation bar. The main content area displays 'Liability Buckets - 3 of 4150 Active Accounts'. A red box highlights the 'Next' icon (a right-pointing arrow) in the top navigation bar. The table below shows the following data:

Status	Chgs	Prv Cred	Pmts	Adjs	Trans Out	Balance
Created	386.60	0.00	0.00	0.00	-386.60	0.00

3.22 Identify message or claim history

If there is no message because insurance has been billed previously/when robot reached this point, execution will be complete. Because the WQ was filtered by primary payor, it will work all the true self-pay accounts to attach coverage, and the process will stop once it reaches this point.

Est.
time:
7.10
sec.

Liability Buckets - 108 of 4153 Active Accounts

Status	Chgs	Prv Cred	Pmts	Adjs	Trans Out	Balance
Prebilled						
Closed	66.36	0.00	0.00	0.00	-66.36	0.00
Insurance						
Hospital UB Claim - TOB 131 - 1/26/2023 - 1/26/2023						
Closed	66.36	0.00	-15.70	-26.26	-24.40	0.00
Self-Pay						
Outstanding	66.36	-41.96	0.00	0.00	0.00	24.40

Action:
Click

3.10. Exceptions Handling

N/A for 'As Is' process

3.11. Input Data Description

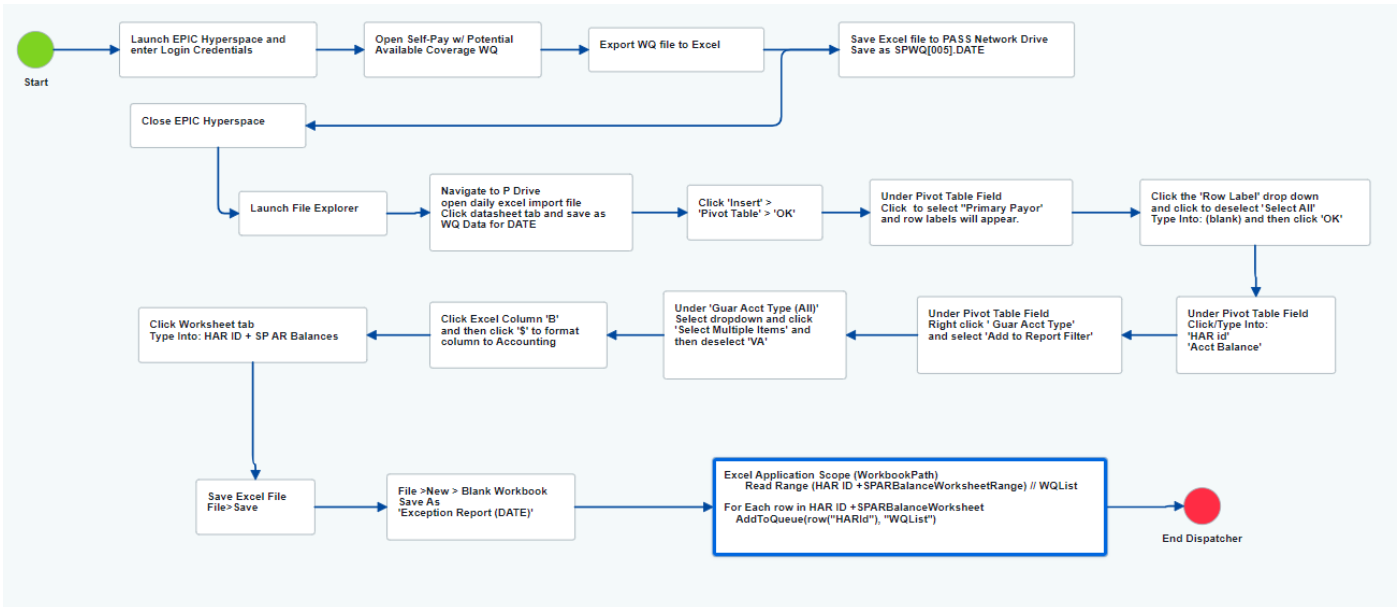
#Action	Sample	Input Type	Location	Are inputs Natively Digital*?	Are the Inputs Structured*?
3.10-3.15	Account Note	Type Into	EPIC	No	No

* **Native Digital:** This is data that was originally created digitally e.g. excel, database or application reports etc. The non-native digital inputs are usually scanned images.*
Structured Data: has a predictable format and exists in fixed fields (e.g. an excel cell or a field in a form) and is easily detectable via search algorithms.

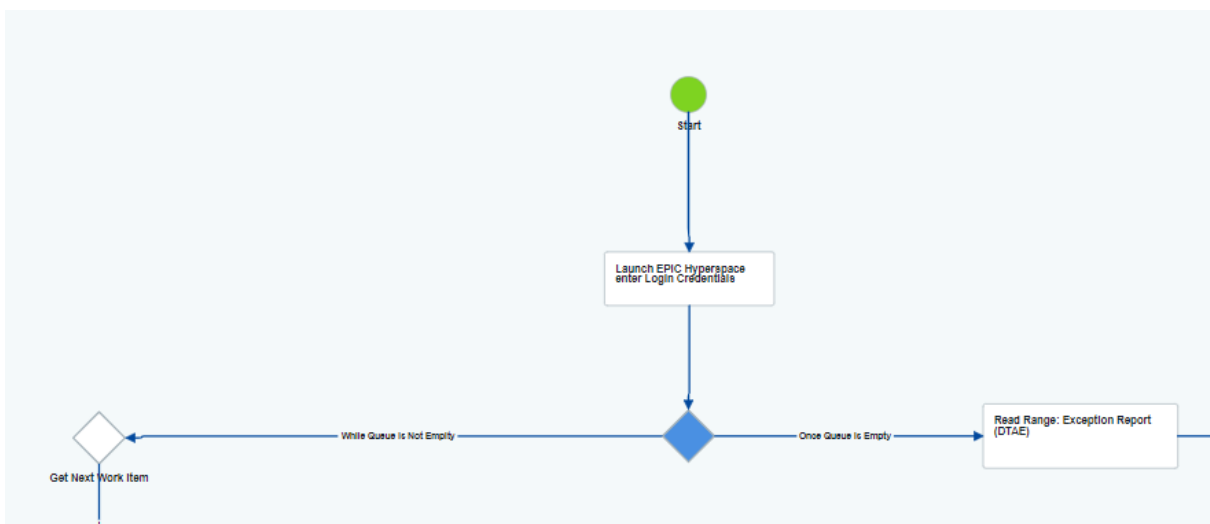
IV.TO BE PROCESS DESCRIPTION

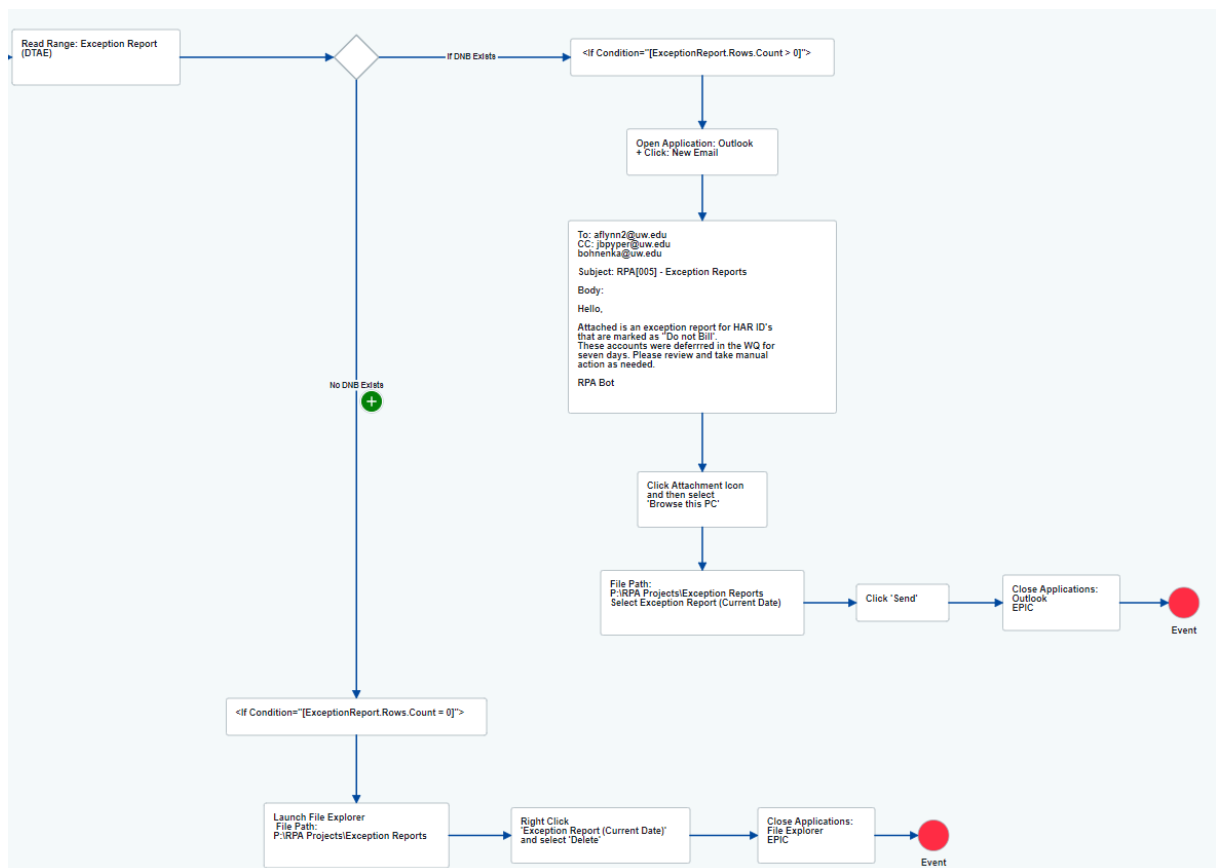
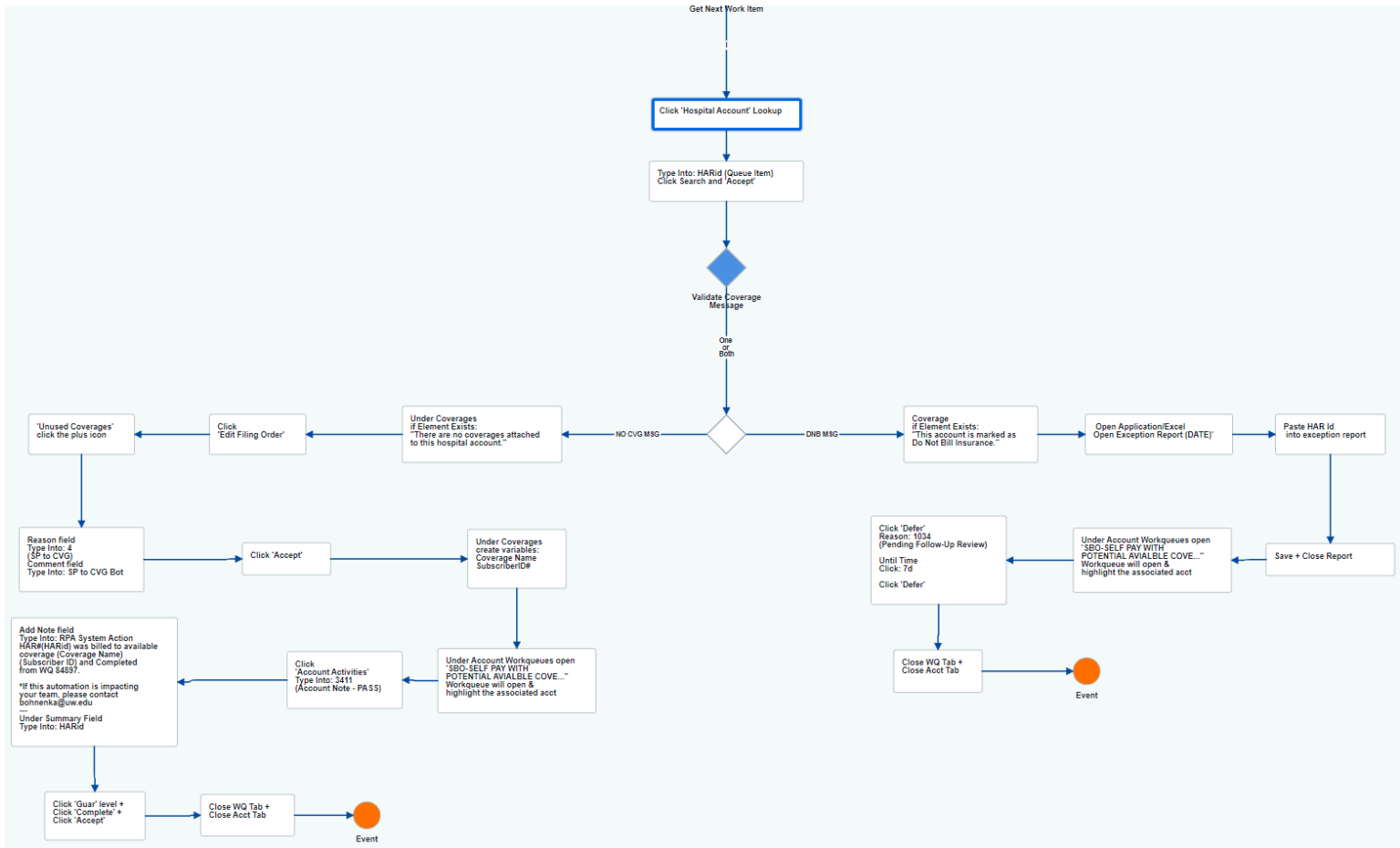
4.1. Detailed TO BE Process Map.

Dispatcher: bot will export WQ data to excel to isolate the HARs with no billing history and available coverage in Registration. The bot will also create an exception report for later use. The isolated HARs will be uploaded into the Orchestrator Queue as transactions for the Performer process.



Performer: the bot will launch EPIC and iterate through each HAR using Hospital Account Lookup. The lookup page will have a 'Coverage' section where the bot will verify if "There are no valid professional coverages associated with this account". This message is the anchor/trigger that will signal the bot attach the coverage. There is an alternate 'do not bill insurance' message with an exception to defer in EPIC, add account to exception report and moving to next transaction. If there are no accounts added to the exception report at the end of processing each HAR, then the bot will delete the report. If any HARs were added to the report, an email with the attachment will be sent to the WQ Team Supervisor + Manager.





Legend	Description
1	Step 3.19 is referred to in Exceptions Handling – Known Business Exceptions
	This process action is proposed for automation.
	VA accounts have been excluded. Actions taken on this process action will remain manual (to be performed by a human agent).

4.2. Parallel Initiatives

Initiative Name	Process Action(s) where it is identified	Impact on current Automation Request	Expected Completion Date	Contact Person
N/A				

4.3. In Scope For RPA

The bot will export the WQ data to isolate the HARs on self-pay accounts where coverage is available but has not been attached or billed historically. The bot will iterate through each HAR to attach the coverage and send the claims. The bot will be able to handle known exception when it comes across HARs with a 'Do Not Bill' Message by deferring in the WQ, adding the account to a daily report, and emailing the responsible team.

4.4. Out Of Scope for RPA.

Activity/Action*	Reason for out of scope	Impact on the TO BE	Possible measures to be taken into consideration for future automation
VA Accounts	Manual review is needed due to coverage appearing as available but is actually missing info from the patient	VA accounts will be excluded in the 'To Be' process	Possible measures could include the VA Team adding a new billing indicator or a specific account status that the bot could recognize as not billable when coverage is incomplete in Reg
Accounts with previous billing history	Accounts with previous billing history require manual review	HARs Excluded	N/A

4.5. Exceptions Handling

4.5.1. Known Business Exceptions

Exception Name	Action	Parameters	Action to be taken
<i>HAR w/ 'Do Not Bill'</i>	3.19	<i>"Do Not Bill" Message</i>	The bot will defer in the WQ, add the account to a daily report, and email the responsible team.

3.5.2 Unknown Business Exceptions

If an unknown exception occurs, the bot should notify Andrew Bartlett (bartla@uw.edu) and Chandi Rae Soros (bohenka@uw.edu), and then proceed to the next transaction.

4.6. Applications Errors & Exceptions Handling

4.6.1. Known Applications Errors and Exceptions

Error/Exception Name	Action	Parameters	Action to be taken
<i>Citrix/EPIC Crash</i>	<i>Any action</i>	<i>Error message</i>	<i>recover and retry 3 times</i>
<i>Application pop ups/notifications</i>	<i>Any action</i>	<i>Element Exists</i>	<i>Close and continue process</i>

4.6.2. Unknown Applications Errors and Exceptions

For errors that have not been anticipated, we can implement time delays and allow three attempts to launch the application before terminating the process and notifying the RPA Team.

Notification List: Andrew Bartlett (bartla@uw.edu), Chandi Rae Soros (bohenka@uw.edu), Kirsten Rising (kristris@uw.edu)

CC: Libbey Buckley (lfarr@uw.edu), and Bruce Pyper (jbpyper@uw.edu).

4.7. Reporting

Report Type	Update frequency	Details	Monitoring Tool to visualize the data
<i>Process logs</i>	<i>Weekly + Monthly?</i>	<i>Have process logs report WQ completion volumes</i>	<i>Export to .csv</i>

** For complex reporting requirements, include them into a separate document and attach it to the present documentation*

V. OTHER

5.1. Additional sources of process documentation

Additional Process Documentation		
N/A		

**Add more rows to the table to reflect the complete documentation provided to support the RPA process.*