Registration

HDC Registration Updates

PDD: HDC Registration Updates

Table of Contents

1. PDD Version Control 3
2. Process Design Document Sign-Off 4
3. References 4
4. Introduction 5
   - 4.1 Purpose of the Document 5
   - 4.2 Objectives 5
   - 4.3 Abbreviations 5
   - 4.4 Key Roles & Contacts 6
   - 4.5 Minimum Prerequisites for Automation 6
5. As-Is Process Description 7
   - 5.1 Process Overview AS IS 7
   - 5.2 Applications Used in the Process 8
   - 5.3 Input and output data 8
   - 5.4 Scheduling Requirements 9
     - 5.4.1 Operating Hours TO BE 9
   - 5.5 As-Is Process Map 9
     - 5.5.1 High level process map 9
   - 5.6 Additional Delivery documentation 10
6. To-Be Process Description 11
   - 6.1 Process Overview TO BE 11
   - 6.2 To-be Functional process map 12
     - 6.2.1 To Be Functional process map 12

6.2.2 To Be Keystroke 14
6.3 Email Notifications 29
6.4 Scope to be considered for RPA automation 30
6.5 Exception Handling 30
6.6 Change Request 31
7. Reporting Requirements 31
8. Risk Mitigation plan 31
9. Other Observations 31

1. PDD Version Control

Version	Description	Status	Created/ Changed By	Created/ Changed Date
0.1	Initial Draft	Draft	Ranjit Jog	03/24/2023
0.2	Changes made as per the SME. Section 6.1	Draft	Ranjit Jog	03/24/2023
0.3	Changes made as per the SME. Section 6.2.1 – TO BE functional map. Section 6.2.2 -> Steps 1.5 – Added FSC change steps in the comparison logic step. Steps 4.1 – Added Updating Invoice FSC steps. Steps 5.1 – Added Batch header steps. Step 6.1 – Added Success/Failure log details.	Draft	Ranjit Jog	03/28/2023
0.4	Changes made as per SME. Section 6.2.1 – TO BE functional map. Section 6.2.2 -> Steps 1.1 – New excel layout. Steps 1.5 – Added additional steps when status is HDC Denied Step 6.1 – Added one more Success log details.	Draft	Ranjit Jog	04/05/2023
0.5	Changes made as per SME Section 6.2.1 – TO BE functional map. Steps 1.5 – Specified that the bot process must always go on to update Invoice FSC regardless of bot report vs visit plan match status	Draft	Jen Snyder	07/26/2023
0.6.	Changes made as per SME Steps 1.5 – Standardized matrix entries; all updates must now move on to FSC flip (Step 4) and Success/Failure is not determined until both visit and FSC have been evaluated by bot Step 4.1. – Accounts for patient deceased/VIP popup and redundant FSC update popup Step 6.3. – Email recipient changed from TBD to RPA Developer Distribution List email address	Draft	Jen Snyder	8/23/2023

2. Process Design Document Sign-Off

In line with the agreed approach, the automation defined within this document must be signed off by the relevant department/ business team prior to the commencement of any development activities.

Once the Final Version of PDD is released for Sign Off, then it is recommended to be completed by Process Owner/SME in 1-3 Business Days

Following PDD sign off, any changes to the process described within this document will be subject to the Change Control Process. Any change in requirements after the Sign Off would be assessed on the urgency, impact assessment and go through approval framework defined in the RPA program before development.

Name, ID & Designation	Department/Location	Signed-Off Date	Email Sign Off Attachment

3. References

Num.	Name	Purpose
1.	\\files.cumedicine.us\Shared\RS-RPA\ImplementationMeetings\	Requirement Artifacts/Recordings

4. Introduction

4.1 Purpose of the Document

The Process Design Document outlines the **HDC Registration Updates** chosen for automation using Robotic Process Automation (RPA) technology.

The document describes the sequence of steps performed as part of the **HDC Registration Updates**, 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 robotic automation to the selected business process.

4.2 Objectives

The **HDC Registration Updates** process has been selected for RPA within **Registration** process area.

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

1. Reduce manual efforts by automating routine activity to allow SMEs to focus on complex activities which improves team member experience.
2. Reduce turnaround time of completing part of invoice processing.
3. Handle the straight rule-based validations automatically based on the Business rules & conditions defined in Keystroke and request human intervention to handle whenever the exception is encountered and drive the process from there onwards.
4. Reducing the AHT (Avg. Handling Time) per Validation
5. Handle the validations automatically based on the Business rules & conditions defined.
6. Have more granularity in output validation report.
7. Better Monitoring of the overall activity by using the logs provided by the robots.

4.3 Abbreviations

#	Terminology	Descriptions	Remarks(optional)
1	RPA	Robotic Process Automation	
2	DU	Document Understanding	
3	F&A	Finance & Accounting	
4	SME	Subject Matter expert	
5	SLA	Service Level Agreement	
6	KPIs	Key performance Indicators	

4.4 Key Roles & Contacts

This specifications document includes concise and complete requirements of the business process, and it is built by the RPA Business Analyst based on the inputs provided by the process Subject Matter Expert (SME) / Process Owner.

The Process Owner is expected to review it and provide signoff for accuracy and completion of the process steps, context, impact and exception handling.

Role	Name	Dept	Notes
Process Reviewer	Process SME; Process Owner	Registration	
Process SME	Daisy De La Torre Gallegos Secret Hardie Elizabeth Minton	Registration	
Process Owner	Michelle Grant	Registration	
IT POC	N/A	ITS	
RPA Program Manager	Jen Snyder	DSD	
RPA Business Analyst	Jim Bowman	DSD	
RPA Solution Architect	Will Farah	DSD	
RPA Developer	Tanya Saatzer	Applications	
Project Coordinator	Jan Buda	DSD	

4.5 Minimum Prerequisites for Automation

Below are the minimum prerequisites for the automation of this process:

#	Category	Description/Assumption	Owner
1	Access for Developer on System	Access for Bot and Developer to be provisioned before Development Starts	RPA BA
2	PDD Approvals	Sign Off from SME and Process Owner	RPA BA
3	Test Data	Availability of test data in Dev/Test environment	SME

4	Environment & Application	Application, System UI, file locations whitelisting, Process Steps, Version, Upgrades should be same for Dev/Test/Production/DR	IT
5	Potential Change	Any change in steps, application in future has to be notified to RPA Support for maintenance of automation	Process Owner

5. As-Is Process Description

This section highlights the AS-IS design of the business process before improvement or automation.

5.1 Process Overview AS IS

Below is some general information and metrics about the Change Summary process.

#	Item	Description
1	Process full name	*HDC Registration Updates*
2	Process Area	*Registration*
3	Department	*Registration*
5	Upstream	N/A
6	Downstream	N/A
7	Process short description (operation, activity, outcome)	*Update visits linked to HDC invoices in Athena IDX with the appropriate plan as per the HDC Status in discrepancy report*
9	Process schedule and frequency	*Daily.*
10	# of items processes /reference period	*Approximately 1000/month*
11	Average handling time per item	*Less than a minute*
12	Peak period (s)	*N/A*
~~13~~	SLAs for the Process	
14	KPIs for the Process	*N/A*
15	Transaction Volume During Peak period	*varies*
16	Total # of FTEs supporting this activity	*1*

17	Expected increase of volume in the next reference period	N/A
18	Level of exception rate	*N/A*
19	Input data	
20	Output data	
21	Public Holiday Schedule and Impact	*N/A*

Note: Use "N/A" for the items that do not apply for specific business process.

5.2 Applications Used in the Process

Below is the list of applications used in the process and the technical details and requirements for accessing these applications.

No.	Application name & version	Description	System Language	Thin/Thick Client	Environment / Access Method	Access POC
1	Athena IDX		English	Thin	Web Application	
2	Microsoft Excel		English	Thick		
3	Shared Drive			Thick		

5.3 Input and Output Data

Below are the inputs and outputs that need to be considered for related process steps:

#	Source/App/System/Dept	Input / Output / Update	Description, Location, Sample
1	App: Athena IDX Invoice details	Input and Update	
2	Discrepancy Report (Excel)	Input and Update	

5.4 Scheduling Requirements

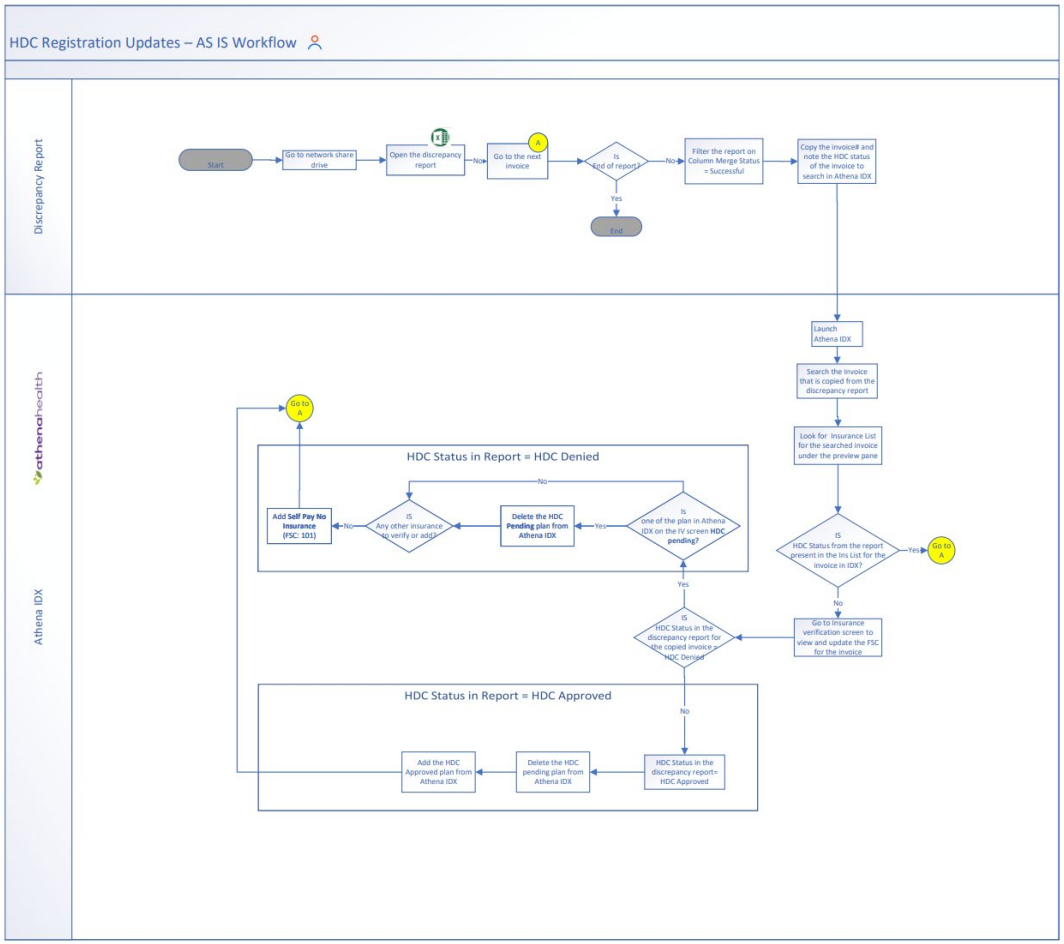
5.4.1 Operating Hours TO BE

Question	Answer
What days of the month will the solution run?	Daily on Weekdays
Provide details of any restricted Days/Times (e.g., Bank Holidays)	TBD
Will the solution run outside normal working hours?	TBD

5.5 As-Is Process Map

5.5.1 High level process map

This section depicts the As Is business process at a High Level to enable developers to have a high-level understanding of the current process.



5.6 ADDITIONAL DELIVERY DOCUMENTATION

No.	Name	Location	Description
1	SDD	*TBD*	TO BE developed by SA after PDD sign-off
2	UAT Test Case Document	TBD	

6. To-Be Process Description

This section highlights the high level TO BE Summary

6.1 Process Overview TO BE

- Send a notification to Business SME when the process starts.
- Bot opens the discrepancy report excel file of the current date which is in a predefined network shared location.
- Look for invoices only with Epic HDC status (Column G) **HDC Approved** or **HDC Denied**.
- Launch Athena IDX and search for the invoice.
- Navigate to the IV screen to view the list of plans/insurances.
- If the HDC status for the invoice in the report is **HDC Denied,** then bot will make sure the list of plans/insurances does not have HDC Pending or Approved. If present, then it will delete the plan.
    - After deleting the plan if the only visit entry is for Z99 then add plan SNO (FSC: 101)
- If the HDC status for the invoice in the report is **HDC Approved,** then make sure the list of plans/insurances does not have HDC Pending plan If present, then delete the plan.
    - Add the HDC Approved plan.
- Bot maintains the status of each invoice that it is working on and update the discrepancy report with the final bot status with Success or Failure.
- On completion of processing all the invoice from the discrepancy report, the bot will send out an email to notify the business that the process is complete.

V0.5

- Regardless of the visit plan match status, the bot will always continue on to update the invoice FSC
  (V0.4. rationale - In the event an invoice rolls up to a visit that has already been updated by the bot (via a different invoice earlier in the queue), the Bot sees that a visit no longer contains the HDC Pending FSC and exits the path ***without ever updating the invoice FSC)***

Note for Developers:

(i) Athena IDX requires explicit login credentials to access.

(ii) Athena IDX has a password expiry rule.

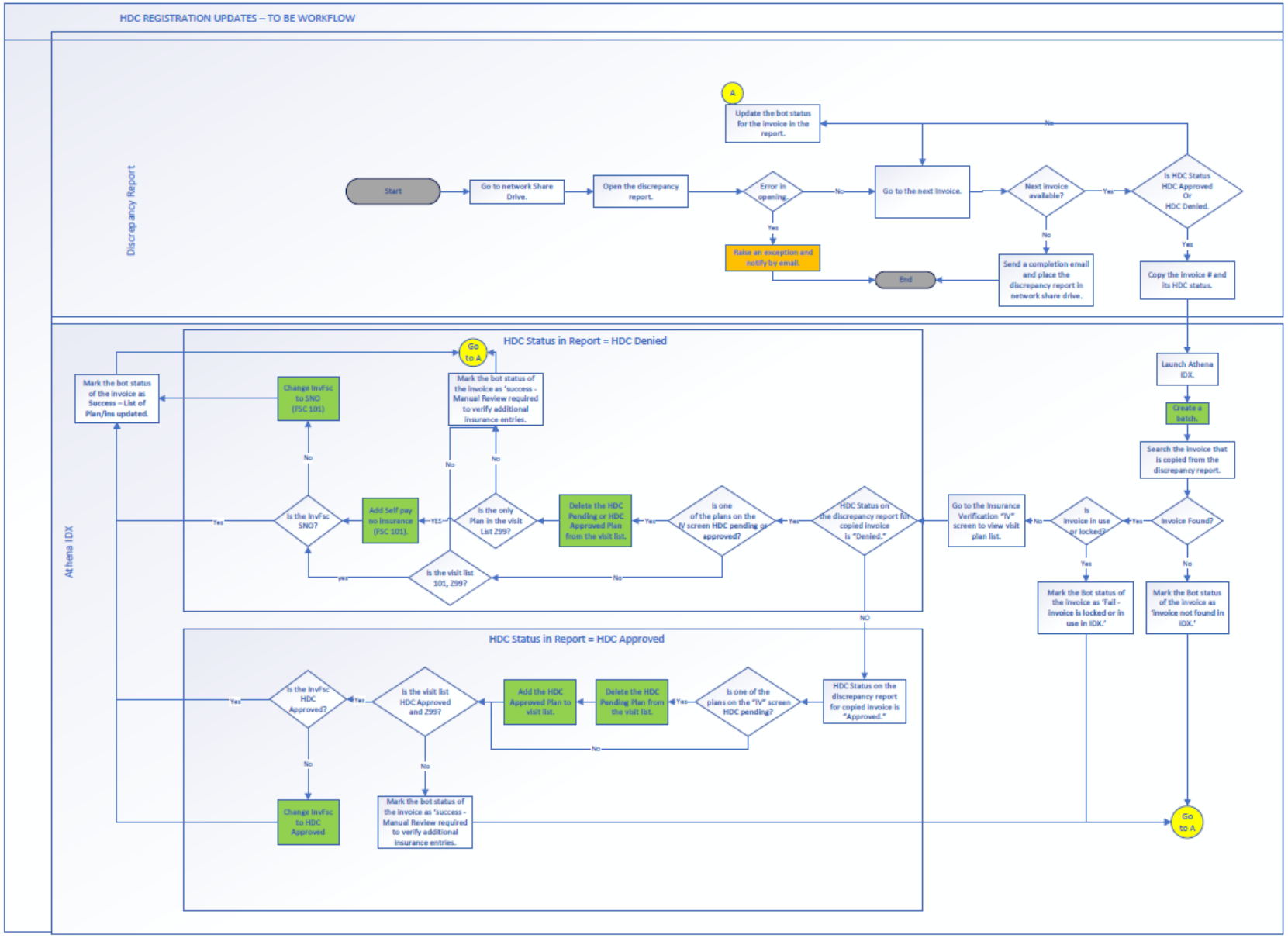
6.2 TO-BE FUNCTIONAL PROCESS MAP

6.2.1 TO BE FUNCTIONAL PROCESS MAP

TO BE solutions with implementation details are in the SDD (Solution Design Document) which will be developed by the RPA Developer Team

Note: Currently, the TO BE workflow is different from the AS IS workflow in the following way:

1. Mention of business exception and how the bot will handle them.
2. Bot will skip the step of viewing the insurance list from the Preview Plane. Instead, it will navigate to the IV screen.
3. Each invoice in the discrepancy report will be updated with its status of Success or Failure after the bot has worked on the invoice.


HDC REGISTRATION UPDATES – TO BE WORKFLOW
Discrepancy Report
Start
Go to network Share Drive.
Open the discrepancy report.
Error in opening
Yes
Raise an exception and notify by email.
End
No
Go to the next Invoice.
Next invoice available?
Yes
No
Send a completion email and place the discrepancy report in network share drive.
Is HDC Status HDC Approved Or HDC Denied
No
Yes
Copy the invoice # and its HDC status.
A
Update the bot status for the invoice in the report.
Athena IDX
Launch Athena IDX.
Create a batch.
Search the invoice that is copied from the discrepancy report.
Invoice Found?
Yes
No
Mark the Bot status of the invoice as 'Invoice not found in IDX.'
Is invoice in use or locked?
Yes
No
Mark the Bot status of the invoice as 'Fail - Invoice is locked or in use in IDX.'
Go to the Insurance Verification "IV" screen to view visit plan list.
HDC Status on the discrepancy report for copied Invoice is "Denied."
Yes
NO
HDC Status in Report = HDC Denied
Is one of the plans on the IV screen HDC pending or approved?
Yes
Delete the HDC Pending or HDC Approved Plan from the visit list.
Yes
Is the only Plan in the visit List 299?
YES
No
Add Self pay, no Insurance (FSC 101).
Is the InvFsc SNO?
Yes
No
Change InvFsc to SNO (FSC 101)
Mark the bot status of the invoice as Success – List of Plan/Ins updated.
Go to A
Mark the bot status of the invoice as 'success - Manual Review required to verify additional insurance entries.
No
Is the visit list 101, 299?
yes
No
HDC Status in Report = HDC Approved
HDC Status on the discrepancy report for copied Invoice is "Approved."
Is one of the plans on the "IV" screen HDC pending?
Yes
Delete the HDC Pending Plan from the visit list.
Add the HDC Approved Plan to visit list.
No
Is the visit list HDC Approved and 299?
Yes
No
Mark the bot status of the invoice as 'success - Manual Review required to verify additional insurance entries.
Is the InvFsc HDC Approved?
Yes
No
Change InvFsc to HDC Approved
Go to A

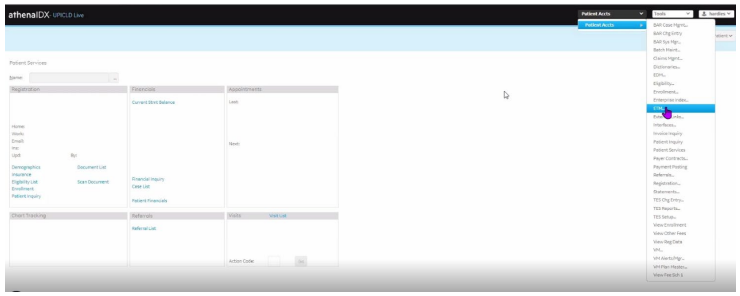
6.2.2 To Be Keystroke

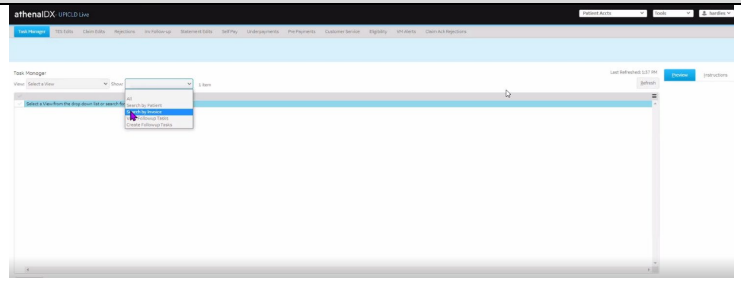
Step Ref.	Process Step	Description
	1. Start of the process – Access the discrepancy Report (Input Preparation)	
1.1	⚠ Look for a discrepancy report excel file with the filename as **HDCStatusDiscrepancies_YYYYMMDD.xlsx** in the following location:	

	A	B	C	D	E	F	G	H
1	InvNum	DOS	IDXMRN	UCHMRN	CHCOMRN	InvFscName	Epic HDC Status	Epic HDC Status Upd
2	31958689	9/5/2022	17359903	U7459010		UCHEALTH HDC PENDING	HDC Denied	3/30/2023
3	31958690	9/5/2022	17359903	U7459010		UCHEALTH HDC PENDING	HDC Denied	3/30/2023
4	31983666	9/7/2022	15899761	U7022413		UCHEALTH HDC PENDING	HDC Approved	3/30/2023
5	31990602	9/5/2022	17360339	U9723111		UCHEALTH HDC PENDING	HDC Denied	3/29/2023
6	31990603	9/5/2022	17360339	U9723111		UCHEALTH HDC PENDING	HDC Denied	3/29/2023
7	31990643	9/6/2022	17360615	U9723399		UCHEALTH HDC PENDING	HDC Denied	4/3/2023
8	31990644	9/6/2022	17360615	U9723399		UCHEALTH HDC PENDING	HDC Denied	4/3/2023
9	32007868	9/6/2022	17360615	U9723399		UCHEALTH HDC PENDING	HDC Denied	4/3/2023
10	32008100	9/8/2022	17364523	U9727121		UCHEALTH HDC PENDING	HDC Denied	3/20/2023
11	32021607	9/14/2022	17244927	U9502070		UCHEALTH HDC PENDING	HDC Denied	12/2/2022
12	32024281	9/9/2022	17364962	U9727653		UCHEALTH HDC PENDING	HDC Denied	3/20/2023
13	32024393	9/14/2022	17366854	U9729278		UCHEALTH HDC PENDING	HDC Approved	2/9/2023
14	32033572	9/10/2022	14228759	U5367583		UCHEALTH HDC PENDING	HDC Approved	3/20/2023
15	32036461	9/17/2022	15106518	U5934432		UCHEALTH HDC PENDING	HDC Denied	12/22/2022
16	32036462	9/17/2022	15106518	U5934432		UCHEALTH HDC PENDING	HDC Denied	12/22/2022
17	32047579	9/9/2022	17364523	U9727121		UCHEALTH HDC PENDING	HDC Denied	3/20/2023

Fig 1

1.2	Filter the report and copy invoice	The only invoices that are in-scope are with **EPIC HDC status** (Column G): - HDC Approved. - HDC Denied. All other statuses will be ignored by the bot
	2. Launch of Athena IDX	
1.1	⚠ Bot launches Athena IDX PROD: https://idxweb.cumedicine.us/cbwui/#/login TEST: https://idxwebtestuci.cumedicine.us/cbwui/#/login	

Step Ref.	Process Step	Description
		 Fig 1 1. Enter username and password. 2. If login fails, then raise a business exception and stop the process.
1.2	⚠ Search Invoice	 (Fig 1)

Step Ref.	Process Step	Description
		 (Fig 2)

	A	B	C	D	E	F	G	H
1	InvNum	DOS	IDXMRN	UCHMRN	CHCOMRN	InvFscName	Epic HDC Status	Epic HDC Status Upd
2	31958689	9/5/2022	17359903	U7459010		UCHEALTH HDC PENDING	HDC Denied	3/30/2023
3	31958690	9/5/2022	17359903	U7459010		UCHEALTH HDC PENDING	HDC Denied	3/30/2023
4	31983666	9/7/2022	15899761	U7022413		UCHEALTH HDC PENDING	HDC Approved	3/30/2023
5	31990602	9/5/2022	17360339	U9723111		UCHEALTH HDC PENDING	HDC Denied	3/29/2023
6	31990603	9/5/2022	17360339	U9723111		UCHEALTH HDC PENDING	HDC Denied	3/29/2023
7	31990643	9/6/2022	17360615	U9723399		UCHEALTH HDC PENDING	HDC Denied	4/3/2023
8	31990644	9/6/2022	17360615	U9723399		UCHEALTH HDC PENDING	HDC Denied	4/3/2023
9	32007868	9/6/2022	17360615	U9723399		UCHEALTH HDC PENDING	HDC Denied	4/3/2023
10	32008100	9/8/2022	17364523	U9727121		UCHEALTH HDC PENDING	HDC Denied	3/20/2023
11	32021607	9/14/2022	17244927	U9502070		UCHEALTH HDC PENDING	HDC Denied	12/2/2022
12	32024281	9/9/2022	17364962	U9727653		UCHEALTH HDC PENDING	HDC Denied	3/20/2023
13	32024393	9/14/2022	17366854	U9729278		UCHEALTH HDC PENDING	HDC Approved	2/9/2023
14	32033572	9/10/2022	14228759	U5367583		UCHEALTH HDC PENDING	HDC Approved	3/20/2023
15	32036461	9/17/2022	15106518	U5934432		UCHEALTH HDC PENDING	HDC Denied	12/22/2022
16	32036462	9/17/2022	15106518	U5934432		UCHEALTH HDC PENDING	HDC Denied	12/22/2022
17	32047579	9/9/2022	17364523	U9727121		UCHEALTH HDC PENDING	HDC Denied	3/20/2023

Fig 3

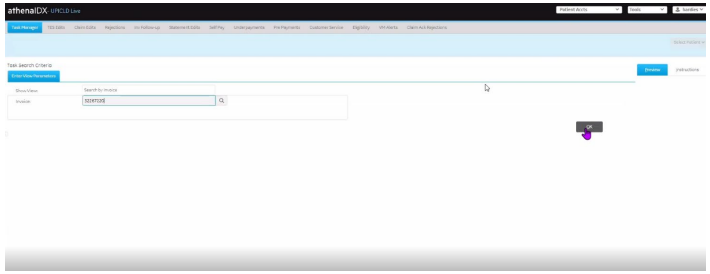
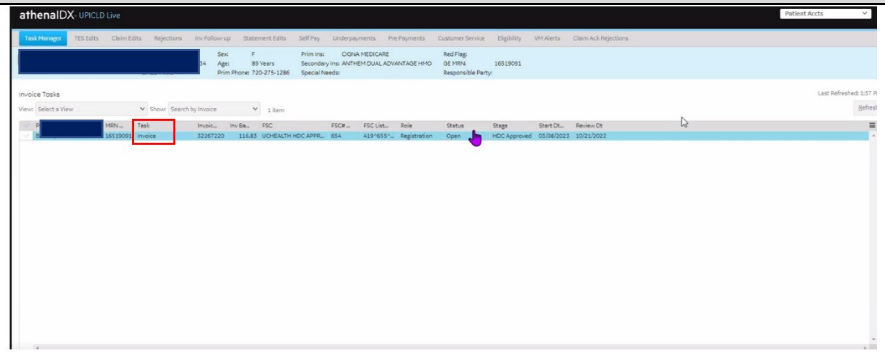
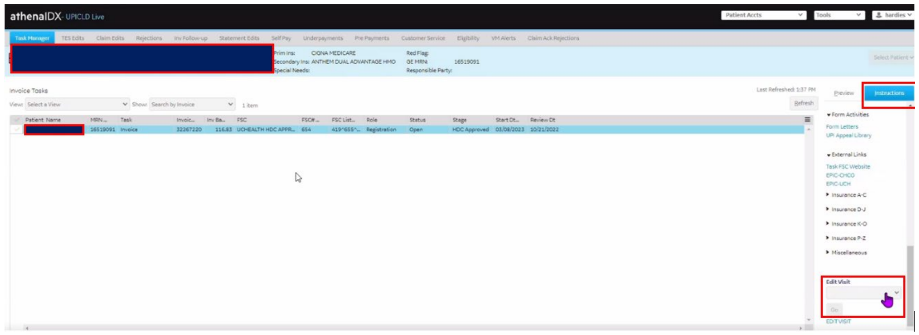
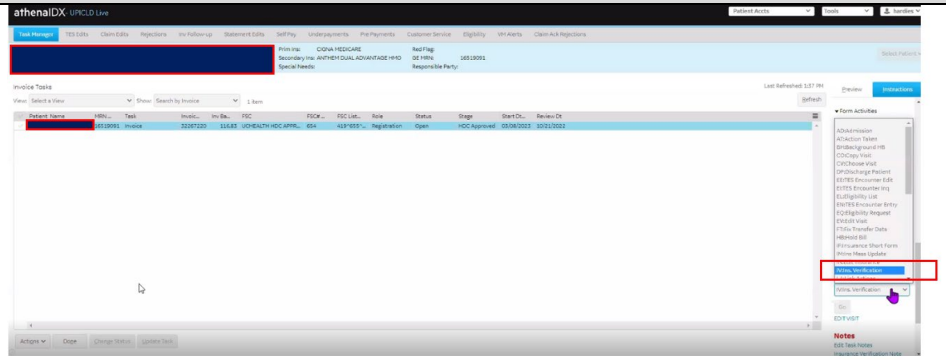
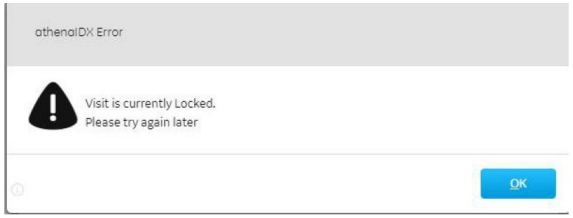


Fig 4

Step Ref.	Process Step	Description
		 Fig 5  Fig 6

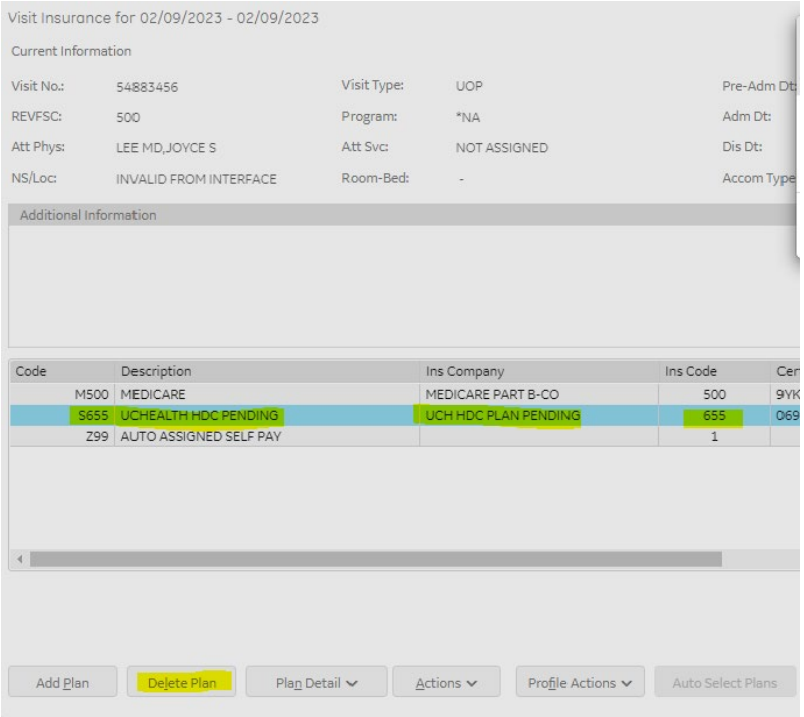
Step Ref.	Process Step	Description
		 Fig 7  Fig 8 1. Navigate to Patient Accts>ETM>Task Manager>Show: “Search By Invoice”. Fig 1 – Fig 4 2. Paste the Invoice number from column A of the discrepancy report. – Fig 4 3. Click OK. 4. Highlight the line that shows “**Invoice**” in the “Task” column. 5. Navigate to Instructions Pane 6. Scroll down to the drop-down menu under “Edit Visit.” 7. Type in or find action code “IV” for Ins. Verification screen. 8. If this invoice/visit is in use, you will get an error screen as shown in Fig 8. If that happens then click OK to continue to the next invoice from the report and try this invoice later. 9. Click OK 10. This screen shows the FSC list for the visit
1.4	Loop through the list of visit plans on the IV screen in IDX	
1.5	Compare HDC status from the bot report to the list of visit plans on the IV screen in IDX	1. Create a Batch Header *(Go to “Creating Batch Header” to see the steps)* **2. Follow the table below to review and update.**

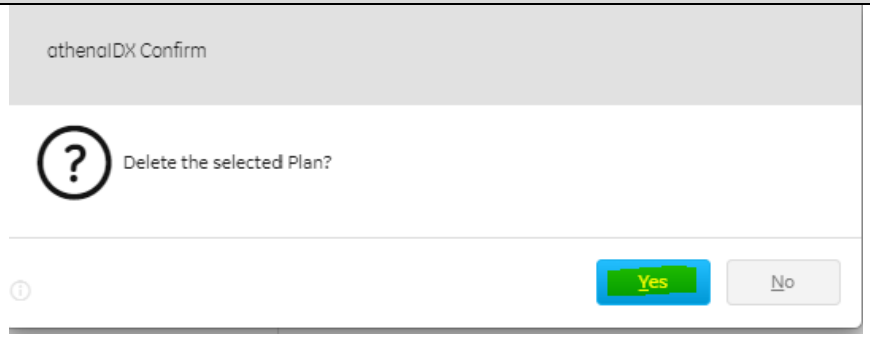
Step Ref.	Process Step	Description

HDC Status in report	*Visit Plan*	*Action to be taken by the bot.*
HDC Approved	HDC PLAN EXTERNAL PENDING (FSC 659)	Delete HDC PLAN EXTERNAL PENDING PLAN *(Go to "**Delete an FSC from the Visit**" to see the steps)* Add HDC EXTERNAL Approved (FSC 656) *(Go to "**Adding an FSC to the list**" to see the steps)*
HDC Approved	UCH HDC PLAN APPROVED (FSC 654)	(No modification to Visit Plan required)
HDC Approved	UCH HDC PLAN PENDING (FSC 655)	Delete UCH HDC PLAN PENDING *(Go to "**Delete an FSC from the Visit**" to see the steps)* Add HDC PLAN Approved (FSC 654) *(Go to "**Adding an FSC to the list**" to see the steps)*
HDC Approved	HDC PLAN EXTERNAL APPROVED (FSC 656)	(No modification to Visit Plan required)
HDC Denied	AUTO ASSIGNED SELF PAY (FSC *Z99) AND/*OR SNO (FSC 101)	(No modification to Visit Plan required)
HDC Denied	HDC PLAN EXTERNAL APPROVED (FSC 656) OR UCH HDC PLAN APPROVED (FSC 654)	Delete the Approved plan from the list. *(Go to "**Delete an FSC from the Visit**" to see the steps)* After deleting the plan, if the only visit that remains on the list **is Z99 AUTO ASSIGNED SELF PAY** then, add **SELF PAY NO INSURANCE (FSC 101).** *(Go to "**Adding an FSC to the Visit list**" to see the steps)*
HDC Denied	HDC PLAN EXTERNAL PENDING (FSC 659) OR UCH HDC PLAN PENDING (FSC 655)	Delete the PENDING plan. *(Go to "**Delete an FSC from the Visit**" to see the steps)* After deleting the plan, if the only visit that remains on the list is **Z99 AUTO ASSIGNED SELF PAY** then, add **SELF PAY NO INSURANCE (FSC 101).** *(Go to "**Adding an FSC to the Visit list**" to see the steps)*

3. **Proceed to update the Invoice FSC (Code: 70) for all invoices *(Go to "Updating Invoice FSC" to see the steps)***

2. **Delete a visit plan from the Visit**

Step Ref.	Process Step	Description
2.1	This will be applicable to all the activity that requires to delete a visit plan.	 Fig 1

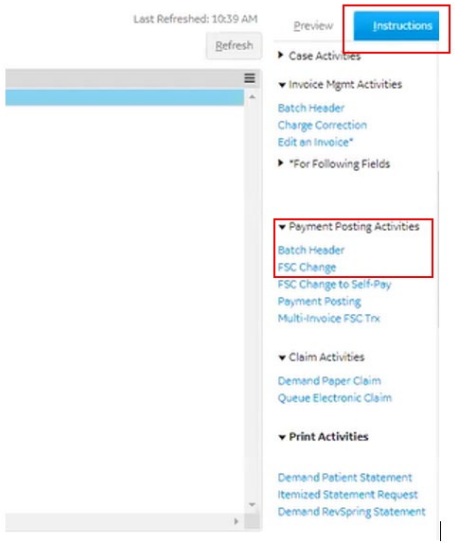
Step Ref.	Process Step	Description
		 Fig 2 1. Highlight on the visit that needs to be deleted based on the business rule above. – Fig 1 2. Go to the bottom of the screen and click on the button “Delete Plan”. – Fig 1 3. A confirmation dialog appears. Click yes on the dialogue box. – Fig 2
		3. Adding a visit plan to the list.
3.1	This is applicable when a plan is to be added or SNO is to be added.	

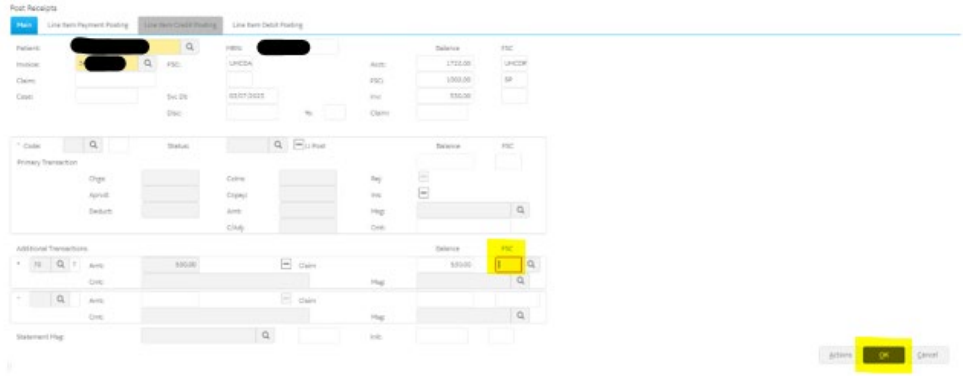
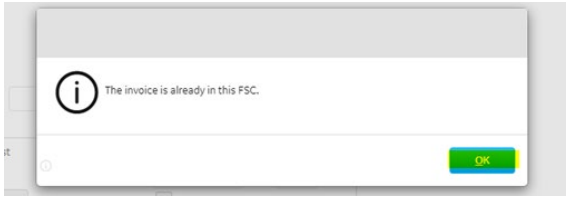
Step Ref.	Process Step	Description
		Fig 1

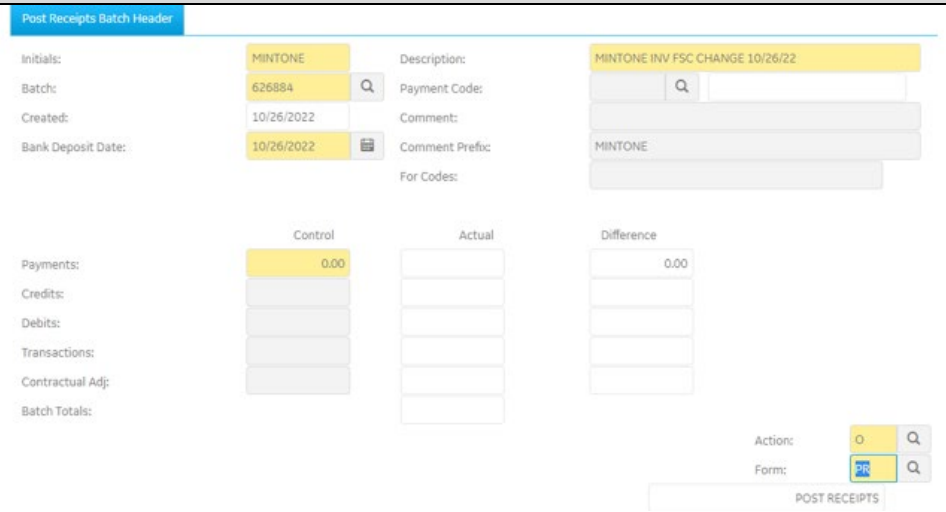
Step Ref.	Process Step	Description
		Add Insurance Visit No.: 54883456 Visit Type: UOP Pre-Adm Dt: Adm Dt: 02/09/2023 Other Visit / Employer / Insurance Co. / FSC / Plan Code Which FSC: Reg FSCs / Other Selected FSCs: 500,550,654,311,655 Ins. Co Filter: Payor ID Filter: FSC: 654 Add FSC Select Plans to be Added Code / Description / Ins. Co. Name / FSC / Typ... / Start Date / End Date / Ins. Co. Add. Line 1 G311 COLORADO INDIGENT CA... 311 B M550 MEDICAID 550 B M500 MEDICARE 500 B S654 UCHEALTH HDC APPROV... 654 B S655 UCHEALTH HDC PENDING 655 B Code Sort / Auto Select Plans / Add Plan Plans to be Added Code / Description / Ins. Co. Name / FSC / Typ... / Start Date / End Date / Ins. Co. Add. Line 1 S654 UCHEALTH HDC APPROV... 654 B Remove / OK / Cancel Fig 2

Step Ref.	Process Step	Description
		S654 - UCHEALTH HDC APPROVED[Field 6 of 22] Insurance Fields and Values Patient: [redacted] MRN: 13162373 DOB: [redacted] Sex: F Visit No.: 54883456 VTYP: UOP Adm Dt: 02/09/2023 Plan: S654 - UCHEALTH HDC APPROV FSC: 654 - UCHEALTH HDC APPROVED *Eligibility Status: E VER *Eligibility Outcome: *Ins. Co. Name: UCH HDC PLAN APPROVED *Ins. Co. Name Override: UCH HDC PLAN APPROVED *Ins. Co. Telephone: *Member ID: 000 *Insurance Plan: *Insurance Group: *Effective Date: 09/01/2022 *Expiration Date: 12/02/2023 *Relationship to Subscriber: SELF *Subscriber Name (if different): TONG,LAI KUN *Insured Birthdate: 03/24/1956 Fig 3 athenaIDX Confirm There are TES encounters and BAR invoices attached to this visit. The FSC lists no longer match. OK? Yes No

Step Ref.	Process Step	Description
		Fig 4 1. Click on the button “Add Plan”. Fig 1 2. Select radio button FSC – Fig 2 3. On the FSC: text box, type the appropriate FSC to search for and click search. – Fig 2 4. Multiple plans will be listed.- Fig 2 5. Select the check mark column (1st col) on the appropriate plan based on the business rule. – Fig 3 6. Click the “Add Plan.” button. 7. Click the OK button to add. **If adding an approved plan**, after selecting the plan from the list, a review form will appear as shown in Fig 3 1. If Ins. Co. Name:” field is blanks, then put In appropriate D120. -HDC PLAN EXTERNAL APPROVED -UHC HDC PLAN APPROVED. 2. If member ID field is blanks, enter “000.” – Fig 3 3. If relationship to subscriber is blanks, enter “SELF.” – Fig 3 4. Click OK to save form. 5. Click OK when back on the IV screen to save visit information. 6. Click Yes on the popup. – Fig 4
4. Updating Invoice FSC		
4.1		

Step Ref.	Process Step	Description
		 Fig 1 Fig 2

Step Ref.	Process Step	Description
		 Fig 3  Fig 4 1. If a batch header for the day is not created, then go to "**Create Batch Header**" to perform steps for creating the batch. (***Note**: Batch needs to be created just once each day*) 2. Navigate to the Instructions Pane, expand *Payment Posting Activities* and click *FSC Change* – Fig 1 2.1. In the event a patient is deceased or marked as a VIP in IDX, a popup message appears and indicates such – Fig 2. *Click Ok* *3. Enter F*SC 654 *or* 656, per the StatusDiscrepancies Report – Fig 3 4. *Click OK* 4.1. In the event an invoice is already in the FSC entered in step 3, a popup appears that states "The invoice is already in this FSC" – Fig 4. *Click Ok*
		5. Create Batch Header
5.1		

Step Ref.	Process Step	Description
		 Fig 1 1. On the instructions Pane click on *Batch Header* 2. Enter the following information (Fig 1): • Initials: <username> • Batch: G (generate) • Bank Deposit Date: T (today's date) • Description: "<Initials> FSC Change Date" (ex. "MINTONE INV FSC CHANGE 10/26/22") • Comment Prefix: username initials • Payments: 0.00 • Actions: O • Form: PR • Copy and paste invoice number from column A on report into the "Invoice" field. • Tab twice to get to the "Additional Transactions" field. • Add code 70 to indicate a FSC change. • Tab once to "FSC" field. • Input appropriate approved HDC FSC. • Click "OK."
6. Updating the status of every invoice		

Step Ref.	Process Step	Description
6.1	Based on the review in Athena IDX, the status of each invoice in the discrepancy report will be updated	Bot Statuses: 1. Success - No Change required. 2. Success – List of Insurance updated. 3. Success – Manual Review required to verify additional insurance entries. 4. Fail – Invoice is Locked or in use. 5. Fail – Invoice not found in Athena IDX 6. Fail – <Exception>
7. Umbrella Rule **If there are any system exceptions for which bot is not able to either process invoices or unable to access any systems, then an appropriate notification will be generated.**		

6.3 EMAIL NOTIFICATIONS

# No.	Step Name	Description	Email
1	Start of the process	Email to notify specific user list that the process has started	To: rpadevelopers@cumedicine.us Subject: HDC Registration updates process has started HDC Registration updates automation process started on <Date and time>
2.	End of the process	Email to notify specific user list that the process has ended	To: rpadevelopers@cumedicine.us Subject: HDC Registration updates process has ended HDC Registration updates automation process ended on <Date and time>

6.4 SCOPE TO BE CONSIDERED FOR RPA AUTOMATION

#	Description	Category	In Scope for Bot	Out of Scope for bot	Remarks/Reading Criteria
1	HDC Status of **HDC Approved** and **HDC Denied**	Input	X		
2	CHCO HDC PLAN	Input		X	As per the SME
4	Changing password of Athena IDX	Output		X	Bot is not configured to change the password automatically. IT team within CU medicine will need to handle this

6.5 EXCEPTION HANDLING

This section captures the comprehensive list of all exceptions, warnings or notifications with the action or workaround to be taken for each exception by the robot.

Known Business exceptions.

The Section explains any known business exceptions met in practice before and captured during the process evaluation.

All the Email Alerts are explained in this format.

# No.	Step Name	Description	Action
BE1	File not found	The discrepancy report not found	Bot will log this exception in the orchestrator and notify IT/business through email. Process Ends.
BE2	File is corrupted or in use	The discrepancy report issue.	Bot will log this exception in the orchestrator and notify IT/business through email. Process Ends.
BE3	Network shared drive not accessible.	Shared drive access issue.	Bot will log this exception in the orchestrator and notify IT/business through email. Process Ends.
BE4	Unable to login to Athena IDX	Unable to login into Athena IDX	Bot will log this exception in the orchestrator and notify IT/business through email. Process Ends.

Known Application / Technical exceptions.

The table below reflects any known application / technical exceptions such as errors, warnings or notifications from an application or system.

# No.	Step Name	Description	Email
1	System is not available		To: rpadevelopers@cumedicine.us Subject: Application exception Bot is erroring out when trying to access the following applications:

Unknown exceptions

For any unknown exceptions, the robot should perform the following:

- For business exceptions: send an e-mail to rpadevelopers@cumedicine.us
- For Application / Technical exceptions: send an e-mail to rpadevelopers@cumedicine.us

6.6 Change Request

7. Reporting Requirements

8. Risk Mitigation plan

1. If there are any system wide outages or exception due to which this automated process is impacted for a longer period, then it will be the responsibility of Registration team to take necessary actions.
2. If there is a business or process change and if it requires an enhancement to the current automation process then in such cases, there will be a need to obtain the change in requirement and will be tracked under change request.

9. Other Observations

N/A currently

Intentionally left blank.