

Process Design Document / Solution Design Document

Process Name: InBasket Renewals – Tech Triage

Purpose of Document

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

1.1 DOCUMENT CONTROL

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

DOCUMENT HISTORY

Version	Date	Author	Approver	Reasons for Change
1.0	12/1/21			New initial draft
1.1	12/13/21			Logic changes
1.2	12/14/21			Automated QA added
1.3	5/4/22			Workflow adjustments after UAT
1.4	6.13.22			Workflow adjustments after hypercare
1.5	6.17.22			Workflow adjustments after hypercare
1.6	6.25.22			Workflow adjustments after hypercare
1.7	7.15.22			Workflow adjustments after hypercare
1.8	9.12.22			Epic SU Changes
1.9	5.9.23			Epic SU Changes
2.0	6/13/23			Pool Name changes
2.1	8/8/23			Workflow Adjustments

2.2	9/5/23			Upgrade SU Changes
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REVIEW

Name	Role	Date
Process Owner		9/19/23
SME		9/19/23

STAKEHOLDERS

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

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1.2 PURPOSE OF THIS DOCUMENT

This document intends to provide a detailed process and solution design proposal for robotics automation of the 'Inbasket Triage process. (Tech Triage Pool Only)

2. General Process Description

2.1 PROCESS SUMMARY

The in-basket triage process currently involves pharmacy techs evaluating a prescription request, completing the required information, and routing the request to the appropriate source. There are certain medications that have 'protocols' within Epic that can automatically be routed to the appropriate source. This process involves medications that a need manual review to determine the appropriate routing group. The automation will aim to appropriately fill out the note and route the medication to correct source for a predefined set of prescription request types. . (Tech Triage Pool Only)

2.2 DATA FLOW & APPLICATIONS

Input

Input	Format	Location	Frequency	Comment
Refill Requests	Messages	Epic Inbasket (35542)	TBD	

Output

Output	Format	Location	Frequency	Comment
Status Log	Excel	Emailed	Daily	

2.2.1 Systems

Application	Interface	Req Key / Operation / URL	Comment
Outlook	Desktop Application	Not applicable	

Epic	Desktop Application	IAHIB	
Excel	Desktop Application	Not applicable	

2.1 BUSINESS RULES

Rule	Detail
Automation frequency	Daily
Bot run time	9pm-6am
Excluding weekends and holidays	No
SLAs	Stop before business hours

2.1 CURRENT STATE METRICS

Avg. Monthly Transactions	# Batches Monthly	Avg. Volume / Batch (DAILY)	Weekly Avg. Volume	Frequency
750 daily X 30 =	30	Total of 2500 messages daily in Pharmacy Tech Triage Pool (30% is in automation scope)	750 daily X 7 days	Daily

2.2 PROCESS FLOW

High Level Process Flow (Current state)

Detailed "Current state" Process Steps

1. Select message from InBasket

- a. Baton on left side of message is usually selected to indicate the encounter has been taken.
 - i. ? = Not taken
 - ii. + = Taken by Self
 - iii. - = Taken by Other
2. Select "Enc" to open encounter
3. Select "Meds & Orders" tab or scroll down to same area
4. Type ".refill1" under "My Note" and hit the return key to populate note.
5. Complete ".refill1"
 - a. "F2" on keyboard to forward to next field
 - b. 1st Field: "Last date the medication was ordered: ***"
 - c. 2nd Field: "Is this request for a controlled substance?{CMSL Controlled Substance Yes/No:51332}"
6. Verify:
 - i. Patient has been seen within the last 365 days or has an upcoming appointment scheduled.
 - ii. Patient is due for refill (i.e. not excessively early / excessively late)
 - iii. Medication, Directions, Quantity, and Refills on requested prescription are the same as last ordered.
 - iv. Last provider to order medication is the same as the PCP or in the same department as the PCP.
7. Route to *** for approval
 - i. Select "Routing" tab or scroll down to same area
 - ii. Select "Add ***"
 - iii. Select "Send and Close Workspace"

Bot Automation Process & Workflow (Future State)

Diagram – Refer to future state diagram attachment in the PDD Archive folder

1. Bot will type In Basket Class and clicks on it
2. Bot will type 35542 and press enter
3. Bot will click Accept
4. Bot will type in basket and click on In Basket
5. Bot will click Refresh
6. Bot will run the RWB report
7. Bot will use the patients/records from the RWB
8. Bot will process each message from RWB
9. Bot will provide an output file

Automated QA – Successful Happy path messages

- 1 – Bot will go back to the patient chart review
- 2 – Bot will open the same refill encounter
- 3 – Bot will check if the routing has been completed
- 4- Bot will provide in the output file that routing has been confirmed

3. Step-By-Step Process Documentation

3.1 HAPPY PATH OF AUTOMATION

1. Bot will open Epic
2. Bot will enter username and password and clicks 'Login'
3. Bot will select 103587 for 'Department'.
4. Possible Pop Up: Epic scheduled upgrade alert: Epic will be down during MMDDYYYY HH:MM .
5. Bot will click on Epic > type In Basket Class and clicks on InBasket Class
6. Bot will type 35542 and press enter in the Add Pool field
7. Bot will click Add then Accept
8. Bot will click on epic > type In basket > select In Basket

9. Bot will click Refresh
10. Bot will go to Epic > type My Reports
11. Bot will pick My Reports
12. Bot will type **IAH Fam Prac Triage Bot** and will add it to favorites
13. Bot will click on the report and run it
14. Bot will click on three dots then export results
15. Bot will type password, and export reason and comment and click Accept
16. Exported file:
 - Column A: Status
 - Column B: Created
 - Column E: MRN
 - Column F: Message ID
 - Column G: Department
 - Column H: Refill Route Provider
 - Column I: Refill protocol
17. Bot will filter out: Done messages (Column A: Status)
18. Bot will filter out: Protocols that that are not included (Column I: Refill protocol)
 - Reference file: Off Protocols (Fam Prac) tab:
[https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/Doc.aspx?sourcedoc=%7B39D3C8F6-FB7D-4A56-935A-4A1C43DF8E1D%7D&file=Protocol%20List%20\(Bot\).xlsx&action=default&mobileredirect=true](https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/Doc.aspx?sourcedoc=%7B39D3C8F6-FB7D-4A56-935A-4A1C43DF8E1D%7D&file=Protocol%20List%20(Bot).xlsx&action=default&mobileredirect=true)
19. Bot will Sort: Oldest to Newest (Column B: Created) and process one MRN at a time

20. Bot will click Search

21. Bot will type the first MRN of the patient from (Column E: MRN) in the Patient field and press enter. Bot will process all MRNs from the list starting from the top.

22. Bot will click Accept from the patient select window

23. Bot will uncheck the DONE message status and then click RUN

24. Bot will click on Rx Request and message will be in the search results

25. Bot will click on the message

26. If Bot sees this alert, Bot will click No, and report it as business exception

27. Bot will click on the ? question Mark to take the message

28. The question Mark will turn into + Plus Sign

29. IF the patient is deceased – The Bot will click REFUSE – and use: REFILL NOT APPROPRIATE -

30. Bot will look to see if the message was routed to any other destination since received

- a. Bot will look under eRX-Medication Refill or Medication Refill
- b. First routing is to the CCPS Fam Prac Refill Call Center Triage Erefill pool or Patient Medication Renewal Request Pool
- c. Bot will save the date and time of the first routing (interface, E-rx SS inbound or patient medication renewal request pool) and will provide it in the output file
- d. If Bot find any other routing *** routed to *** above the initial routing
- e. Bot will click DONE to DONE the message and move on to the next message in the inbasket
- f. If the Bot cannot done the message, and see this alert Bot will continue to the next steps to address the medication

If there is more than one medication in the Rx Request message

- i. Requested (1), Refused (1 or more) - process
- ii. Requested (1), Approved (1 or more) – process
- iii. Requested (1), Approved (1 or more), Refused (1 or more) - process
- iv. Requested (more than 1) - put back
 1. (click on Baton to put it back, mark it as new , go to the next message)

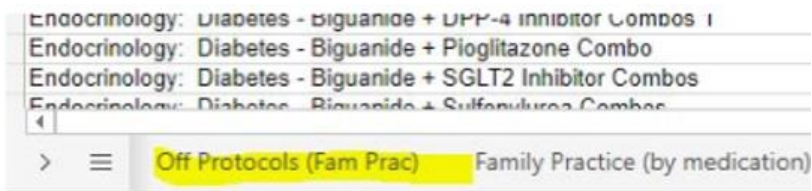
Bot will look at the controlled: column. If there is an X in the column in the message preview–

If there is X in the controlled: column, bot will put the message back

If there is no X, and Is blank, bot will continue processing the message.

31. Bot will look at the protocol of the medication

32. The protocol List (LINK) are listed in the Off Protocols (Fam Prac) list



33. Bot will look and see if the protocol matches a protocol from the list from column A of the spreadsheet

34. If the protocol is not found in the spreadsheet, the Bot will click on the plus sign next to the message to put the message back, and then right click on the message and click mark as new, and go to the next message

35. If the protocol is found in the spreadsheet Bot will check to see if the last authorizing provider is a family practice provider by looking at the authorizing provider name from the requested prescription and then CMSL document as a reference

g. Bot will look under Providers tab in the

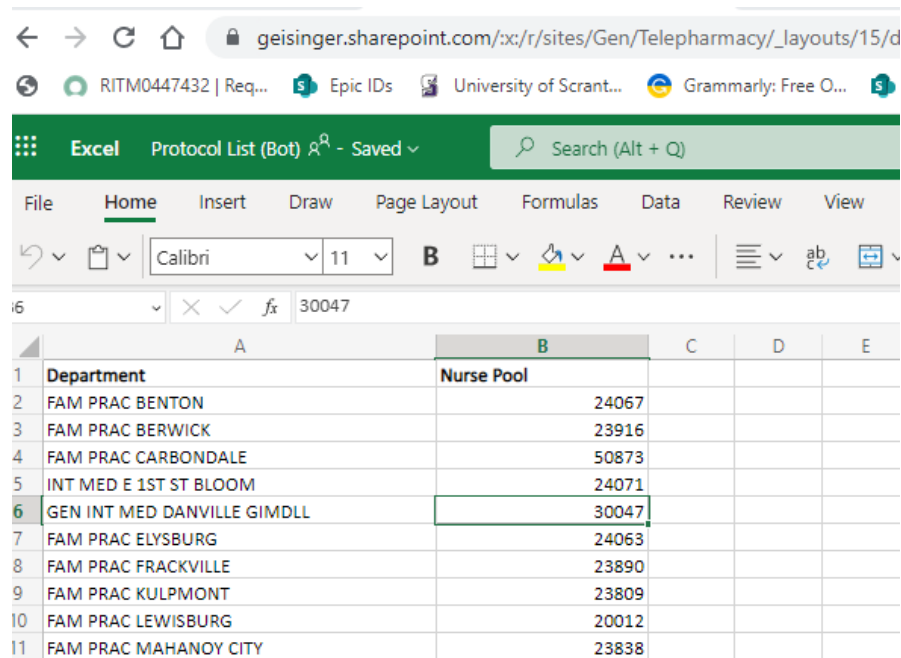
https://geisinger.sharepoint.com/:x:/r/sites/GeisingerCommunityMedicine/_layouts/15/Doc.aspx?sourcedoc=%7B664004C1-49B5-4723-BE80-C4E4809A52A5%7D&file=CM%20Site%20List.xlsx&wdLOR=cF82615FD-D31E-454F-AC35-CEBA9E978DBA&action=default&mobileredirect=true&cid=0ce10d43-98a3-462d-ae42-74fccd0b67e2 document

- i. Epic department name (column D) = providers primary department in Epic
- ii. Provider name (column F) = find the last authorizing provider
 1. Titles may need to be removed from the search (DO, MD, CRNP, PA-C, PsyD, anything in parenthesis, OD, *** etc)
- iii. Specialty (column H) = will be Family Practice, Family Medicine, Internal Medicine, Internal Medicine/Pediatrics, GIM/Internal Medicine,
- iv. Bot will try to match at least one of these specialties from column H to the provider name in Epic
- v. If the prescribing provider is not (Family Practice, Family Medicine, Internal Medicine, Internal Medicine/Pediatrics, GIM/Internal Medicine) from the list– Bot will look at the phone book

b. Bot will click on Phone Book

- i. Bot will type provider name (without the provider title) and click Search
- ii. Bot will look under the department field
- iii. Bot will grab the first department from the list
- iv. Bot will confirm that the provider's department is one of the departments from the column A of the

[https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20\(Fam%20Prac\)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CRefreshingExpiredAccessT&cid=e664f535-df33-4a09-a3c8-4a4bcf5d5b35](https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20(Fam%20Prac)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CRefreshingExpiredAccessT&cid=e664f535-df33-4a09-a3c8-4a4bcf5d5b35)
document > fam prac nurse pools tab



The screenshot shows a web browser displaying a SharePoint document. The address bar shows the URL: [geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20\(Fam%20Prac\)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CRefreshingExpiredAccessT&cid=e664f535-df33-4a09-a3c8-4a4bcf5d5b35](https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20(Fam%20Prac)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CRefreshingExpiredAccessT&cid=e664f535-df33-4a09-a3c8-4a4bcf5d5b35). The document is an Excel spreadsheet titled "Protocol List (Bot)". The spreadsheet has two columns: "Department" (Column A) and "Nurse Pool" (Column B). The data is as follows:

Department	Nurse Pool
FAM PRAC BENTON	24067
FAM PRAC BERWICK	23916
FAM PRAC CARBONDALE	50873
INT MED E 1ST ST BLOOM	24071
GEN INT MED DANVILLE GIMDLL	30047
FAM PRAC ELYSBURG	24063
FAM PRAC FRACKVILLE	23890
FAM PRAC KULPMONT	23809
FAM PRAC LEWISBURG	20012
FAM PRAC MAHANOEY CITY	23838

- v. Bot will also create a crosswalk document to make sure it is capturing the fam prac vs family practice in the names of the departments.
 - a. If the provider is not in the cmsl list, or phone book in Epic (not a primary care provider)
 - i. Bot will look under protocol details, and look at the past visit
 - ii. Bot will look for the authorizing provider past visit
 - If bot finds a past visit with the auth provider (first one close to TD date, bot will continue processing the message)
 - If bot does not find a past visit with the auth provider – Bot will put the message back
 - b. If provider is in any of the primary care locations, or protocol details bot will move on to the next steps
36. Bot will check to see if the pt have a Geisinger PCP – Bot will start with CMSL provider list and then look at the phone book:
- PCP Names can be found in two locations:
- OR

Bot will start with CMSL provider list and then look at the phone book:

CMSL LIST:

- h. Bot will look under Providers tab in the
https://geisinger.sharepoint.com/:x:/r/sites/GeisingerCommunityMedicine/_layouts/15/Doc.aspx?sourcedoc=%7B664004C1-49B5-4723-BE80-C4E4809A52A5%7D&file=CM%20Site%20List.xlsx&wdLOR=cF82615FD-D31E-454F-AC35-CEBA9E978DBA&action=default&mobileredirect=true&cid=0ce10d43-98a3-462d-ae42-74fccd0b67e2 document
 - i. Epic department name (column D) = providers primary department in Epic
 - ii. Provider name (column F) = PCP name
 - 1. Titles may need to be removed from the search (DO, MD, CRNP, PA-C, PsyD, anything in parenthesis, OD, *** etc)
 - iii. Specialty (column H) = will be Family Practice, Family Medicine, Internal Medicine, Internal Medicine/Pediatrics, GIM/Internal Medicine,
 - iv. Bot will try to match at least one of these specialties from column H to the provider name in Epic
 - v. If the PCP is not (Family Practice, Family Medicine, Internal Medicine, Internal Medicine/Pediatrics, GIM/Internal Medicine) from the list – Bot will look at the phone book
- c. Bot will click on Phone Book
 - vi. Bot will type provider name (without the provider title) and click Search
 - vii. Bot will look under the department field
 - viii. Bot will grab the first department from the list
 - ix. Bot will confirm that the provider's department is one of the departments from the column A of the
[https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20\(Fam%20Prac\)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CRefreshingExpiredAccessT&cid=e664f535-df33-4a09-a3c8-4a4bcf5d5b35](https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20(Fam%20Prac)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CRefreshingExpiredAccessT&cid=e664f535-df33-4a09-a3c8-4a4bcf5d5b35) document > fam prac nurse pools tab

Department	Nurse Pool
FAM PRAC BENTON	24067
FAM PRAC BERWICK	23916
FAM PRAC CARBONDALE	50873
INT MED E 1ST ST BLOOM	24071
GEN INT MED DANVILLE GIMDLL	30047
FAM PRAC ELYSBURG	24063
FAM PRAC FRACKVILLE	23890
FAM PRAC KULPMONT	23809
FAM PRAC LEWISBURG	20012
FAM PRAC MAHANAY CITY	23838

- x. Bot will also create a crosswalk document to make sure it is capturing the fam
prac vs family practice in the names of the departments.
- a. If no (based on the above steps on 22) (no PCP or non-geisinger provider), does the
patient have a visit with a primary care department (18 months)
 - i. Bot will click on Protocol Details
 - ii. Bot will look under future appointment
 - iii. Bot will match the first future department name to the department name from
Fam Prac Nurse Pools (Protocol List Bot) document. Repeat this steps until/if
matching departments file.

Department	Nurse Pool
FAM PRAC BENTON	24067
FAM PRAC BERWICK	23916
INT MED E 1ST ST BLOOM	24071
FAM PRAC BLOOM REICHAUT RD	20078
GEN INT MED DANVILLE GIMDLL	30047

- vi. If yes upcoming appts, keep processing the message and route the message to the upcoming visit department nurse pool
 - vii. If no upcoming/ future appts, mark the message as new and move on to the next message (click on Baton to put it back, mark it as new , go to the next message)
 - b. If yes Geisinger PCP, continue processing the message (will find the PCP Nurse pool for routing)
 - i. If patient has PCP – will use that PCP nurse pool
37. If the protocol is found in the spreadsheet in Column A (The protocol List (LINK)), The message will be routed to the Pool the document states in Column B. (see below steps for the pool information)

Protocol Title	Pool
Analgesics: Antirheumatic Agents - abatacept & hydroxychloroquine	PCP nurse pool
Analgesics: Antirheumatic Agents - diclofenac/misoprostol	PCP nurse pool
Analgesics: Antirheumatic Agents - teriflunomide & leflunomide	PCP nurse pool
Analgesics: Antirheumatic Agents - tocilizumab	PCP nurse pool
Analgesics: Antirheumatic Agents - tofacitinib	PCP nurse pool
Analgesics: Muscle Relaxants	PCP nurse pool
Analgesics: Non-Opioid Analgesic Combinations	PCP nurse pool
Analgesics: Topicals	PCP nurse pool

Off Protocol Med List **Off Protocols (Fam Prac)** Family Practice (by medication) Far

38. If Bot sees this orange alert “possible duplicate’ alert, it will hover over to see if there is recent requested /signed medication from 2 weeks

- i. If same med with same strength signed or pending within 2 weeks, to be filled in the same pharmacy, Bot will refuse the medication (if the same med with same strength signed or pending within 2 weeks, to be filled from different pharmacies, BOT will continue to process the message)

To be filled pharmacy in the request med:

To be filled pharmacy in the duplicate signed/**requested**/refused request:

For signed medications – bot will also look at the receipt confirmed by pharmacy

If the receipt conformed by pharmacy is not there – continue processing

- i. refuse and route > check mark next to sign encounter > click sign > refusal reason > Duplicate Reason > Accept >

>Type duplicate request > press enter > click accept

39. Bot will look at the encounter department (left box), and prescribing provider name and recent visit encounter department (right boxes)

- j. Bot will look at this under protocol details

If the patient have no recent or future visits, Provider's primary department via Hadoop will be used

40. The recent visits encounter department for the prescribing provider must match the encounter department

41. If the encounter department is different, Bot will change the encounter department to the past visit department by clicking More > Change Enc Details

- a. Bot will type the department name in the department field (from protocol details)

- b. If additional clinics show up, bot will pick the appropriate one (100% match)

- c. Bot will click Accept

42. IF the encounter department is one of the closed departments from the (LINK), Bot will follow the above steps to change the encounter department by looking at the old department vs new department (link) in the protocol list document

43. Bot will find a recent encounter with the prescribing provider to confirm the department is one of the departments from the family practice (link)

44. Bot will find PCP name from the message and find the PCP fam prac/internal med department under PROVIDERS TAB , and will find the department in the Family Practice Pool (LINK)

Bot will record the pool information from column B next the clinic name column A

The pool number will be in the column B for family practice (by protocol) protocols:

45. If the department is not found in the spreadsheet, the Bot will click on the plus sign next to the message to put the message back, and then right click on the message and click mark as new, and go to the next message
46. If the provider or the department found in the spreadsheet, Bot will click on the FORWARD icon from the message
47. Bot will click inside the TO: field
48. Bot will type the pool number and name in this field and will click Enter
 - a. Add P to the beginning of the pool number and add a space before typing the pool number
49. If the recipient is not populated, and bot cannot find a pool, bot will see this no valid recipient found pop up and will click OK
50. Bot will click Cancel from the message window
51. If no pool is found, the Bot will click on the plus sign next to the message to put the message back, and then right click on the message and click mark as new, and go to the next message
52. If the pool name is populated in the to field, Bot is ready to go into the message field
53. Bot will click inside the white area of the message field
54. Bot will type .offprotocolbot and press enter
55. Bot will click SEND
56. Bot will move on to the next message

57. Once all messages with plus signs are completed (10 at a time) Bot will repeat the steps starting from step 1.
58. Bot will provide output file with success (MRN, Protocol Name, Pool Number, Provider Name, Department Name, the pool number bot sent the message to), failed (business exception) (failed reason, MRN, Protocol Name, Pool Number, Provider Name, Department Name), failed (system exception) (failed reason, MRN, Protocol Name, Pool Number, Provider Name, Department Name)

3.2 OUT OF SCOPE FOR RPA

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

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

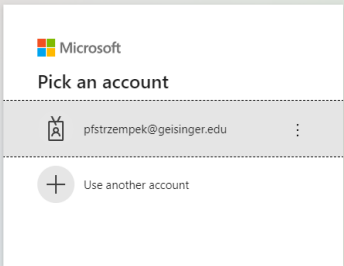
3.1 EXCEPTIONS IN THE PROCESS FLOW

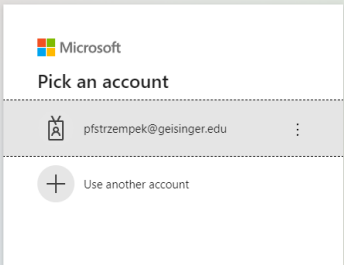
Exception	Actions	Comment
Break the glass popup	Dismiss popup and move on	

3.1 SYSTEM ERRORS

Error	Action	Comment
Application crash	Recover and retry 3 times	

3.2 LINKS

Name	Link	Access	Comment
Protocol List Bot (Bot may get a pop up to log into SP)	 https://geisinger.sharepoint.com/:x:/r/sites/Gen/Telepharmacy/_layouts/15/doc2.aspx?sourcedoc=%7B39d3c8f6-fb7d-4a56-935a-4a1c43df8e1d%7D&action=edit&activeCell=%27Off%20Protocols%20(Fam%20Prac)%27!A38&wdinitialsession=9d2da4e1-18d8-4bec-a183-5bb40f38fc88&wdrldsc=10&wdrldc=1&wdrldr=AccessTokenExpiredWarning%2CrefreshingExpiredAccessT		• Closed Departments • Fam prac Nurse Pools • Off Protocol MEd List • Off Protocols (Fam prac)

CMSL Site List (Bot may get a pop up to log into SP)	 https://geisinger.sharepoint.com/:x:/r/sites/GeisingerCommunityMedicine/_layouts/15/Doc.aspx?sourcedoc=%7B664004C1-49B5-4723-BE80-C4E4809A52A5%7D&file=CM%20Site%20List.xlsx&wdLOR=cF82615FD-D31E-454F-AC35-CEBA9E978DBA&action=default&mobileredirect=true		• Provider names and clinic information
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3.3 PROCESS CONTINUITY

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 (i.e. EPIC, Facets, MI)	• Alert set up for IAH team • IAH plan accordingly	Business will continue to manually process messages
Small Scale Go Live	• Bot will start with small scale during hypercare in order for business and IAH to evaluate outcomes	Will monitor outcomes
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	- Audit/Manual review by IAH and business - Alert system	The audits will determine the next steps for expansion
Hypercare	- Alert system - Logs reviewed by BA and Developer	The audits will determine the next steps for expansion
Production	Bot will be monitored for any possible errors in charts and will be paused until issue resolved	Prevent further errors bot will be paused
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?		The business will continue to address the messages while BOT is down. Alert message will be sent to business and IAH.
If chart errors take place		The Bot will pause to determine the root cause lah will contact business for next steps

4. Additional Process Considerations

4.1 E-MAIL TEMPLATES

Upload the file to SP once complete the daily run:

Distribution List:

Subject: * IAH - Pharmacy- In-Basket Triage *– Process Daily Summary MM DD YYYY

Body: Process Finished on *mm-dd-yyyy* at time *hh:mm*

Email Body:

Input number:

Output number:

List of successes, business exceptions, system exceptions

Excel attachment (refer to output file attachment)

Summary page tab, success tab, tab for each business exceptions, tab for system exception

Email for bot to send if Process Fails (fails the whole day and cannot run the daily run):

Distribution List: iahrpaprodsupport@geisinger.edu, pfstrzempek@geisinger.edu

Subject: * Pharmacy- In-Basket Triage *– Process Failed MM YY DDDD

Body: Process faulted on *mm-dd-yyyy* at time *hh:mm* ET due to *insert reason*

Attachment: No attachment

5. Assumptions And Risks

5.1 ASSUMPTIONS

Assumption	Rationale
TBD	

6. Appendix

6.1 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