



PB Claim Status Palmetto

Process Definition Document

Purpose: The Process Definition Document (PDD) formalizes the final design of an automation solution. It functions as an approval artifact for automation and operations teams, enabling the transition from design to development once approved.

TABLE OF CONTENTS

I.	Automation Overview	3
1.1	<i>Objectives</i>	3
1.2	<i>Operational metrics</i>	3
1.3	<i>Design Team</i>	3
II.	Automation Details	3
2.1	<i>Automation Overview</i>	3
2.2	<i>Applications</i>	4
2.3	<i>High-Level Process Map</i>	4
2.4	<i>Portal Process Map</i>	5
2.5	<i>Toolkit documentation</i>	6
2.6	<i>Out of scope</i>	7
III.	Approval	7
3.1	<i>Approval</i>	7
3.2	<i>Future Initiatives</i>	7
3.3	<i>Downtime Plans</i>	7
3.4	<i>Revisions</i>	8

I. AUTOMATION OVERVIEW

1.1 Objectives

The automation will achieve

- Identification and gathering of Medicare accounts with an open balance that require a claim status check to be performed
- Attaining claim status details from the Palmetto portal for each account
- Returning claim status details into patient accounting system via a return file

1.2 Operational metrics

The automation will impact the following operational metrics

- Denial Resolution Time
- Clean Claim Rate
- Average A/R Days
- Touch Rate per Claim
- % of Claims Requiring Follow-Up
- Timeliness of Payer Follow-Up
- Aging Inventory Distribution

1.3 Design Team

The following individuals contributed to the automation design, must be informed of changes, and agree to support the maintenance of this automation

Name	Role / Title	Contact
Chris Byrd	Operational Owner	chris.byrd@northside.com
Marisol Plantenys	Operational Owner	marisol.plantenys@northside.com
Jacqueline Williams	Operational SME	jacqueline.williams@northside.com
Richard Mageau	Solution Architect	richard.mageau@northside.com
Joe Sanda	Solution Architect	joe.sanda@tarponhealth.com
Jake Richards	Developer	jake.richards@tarponhealth.com

II. AUTOMATION DETAILS

2.1 Automation Overview

Item	Description
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Area / Department	PB Billing/Follow-up
Automation Name	Claim Status Palmetto
Automation Description	This automation gathers Medicare accounts, attains claim status details from the Palmetto portal, and returns claim status details via a return file

2.2 Applications

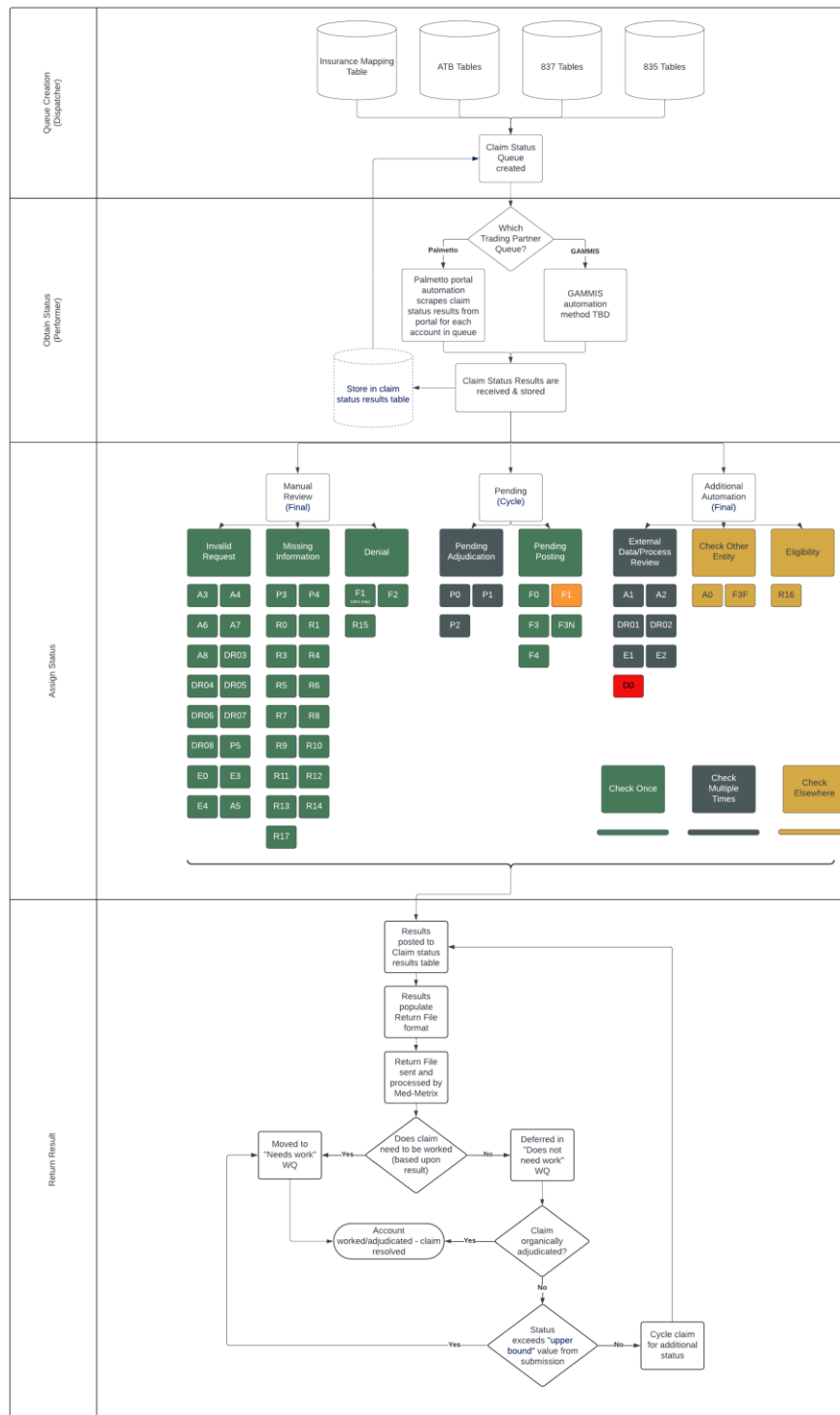
The table below lists the applications being utilized by the automation

Application	Comments / Access Needs
"physicianBilling" Database	Read-only access from the ATB, 837, 835 tables, and write access to the new mapping, crosswalk, and results logging tables
Palmetto GBA eServices	Uses bot credentials to access web portal

2.3 High-Level Process Map

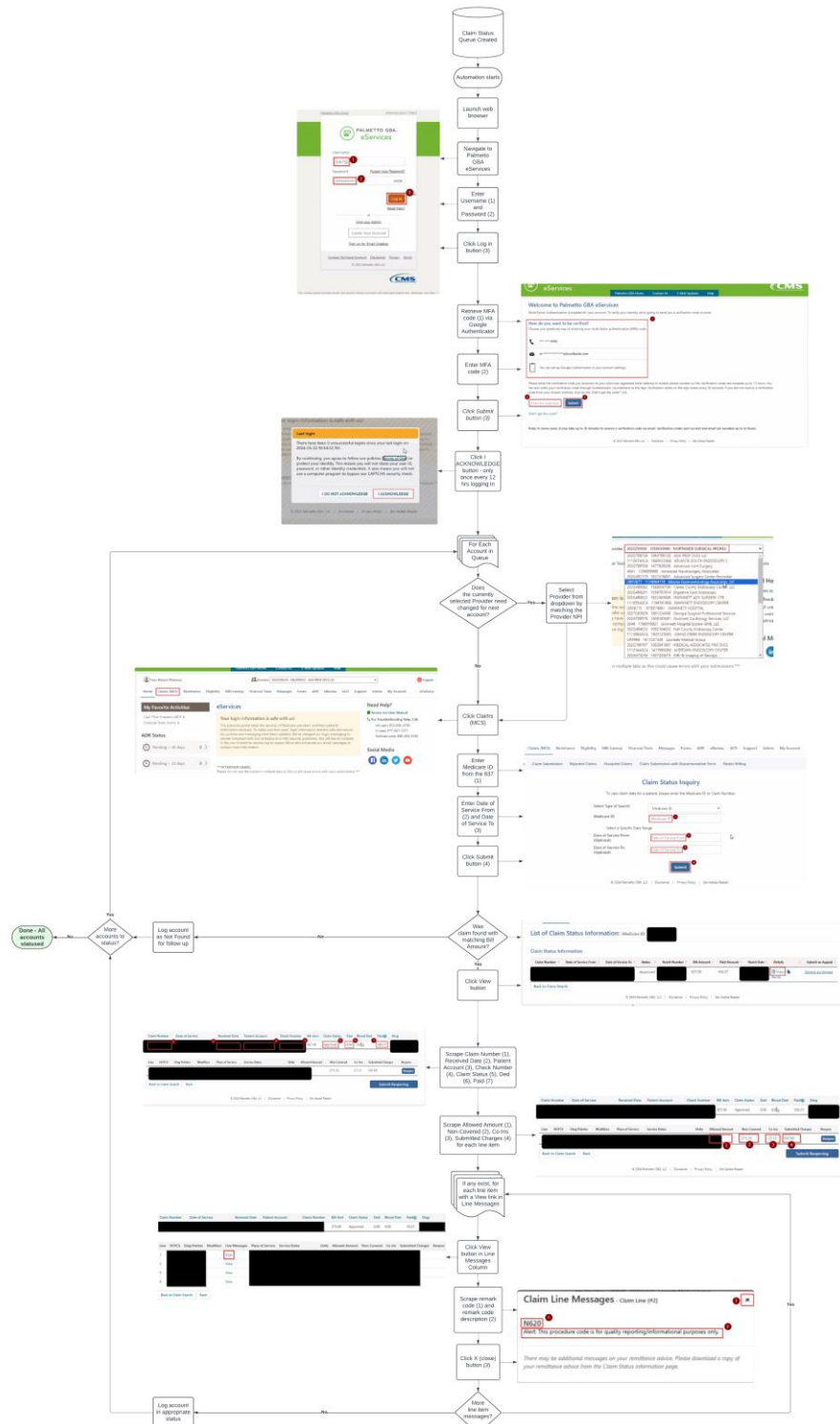
The diagram below contains the steps the automation will take (the 'to-be' process map)

Claim Status - High Level Design - 4/16/25



2.4 Portal Process Map

The diagram below contains the steps the automation will take (the 'to-be' process map)



2.5 Toolkit documentation

The table below provides a list of toolkits and links to the completed ROI, planning toolkits, and any additional design documentation

Toolkit	Link to documentation
Plan Toolkit	Tarpon Health - Claim Status Palmetto - Plan Toolkit - 05.13.2025
ROI Toolkit	Tarpon ROI Toolkit_Claim Status_Palmetto_04.23.2025

2.6 Out of scope

The table below provides a list of automation scenarios or account populations that are out of scope or unobtainable

Scenario / Population	Rationale	Comments
Non-Medicare Payers	Only Medicare claims that can be found on the Palmetto portal should be in scope for this Palmetto automation	Insurance name, insurance group, and trading partner mapping are in the Insurance Dictionary
Returning claim status results into Med-Metrix or Centricity by UI	The preferred route of return is via a flat file import, similar to the design for the Waystar engagement	The return file spec follows the same format as the file used for import by Waystar

III.APPROVAL

3.1 Approval

Upon review and approval of this Process Definition Document (PDD), I, Chris Byrd and Marisol Plantenys, on 5/20/2025, hereby approve this plan for development.

I acknowledge that while this automation will experience downtime, the ultimate responsibility for the process remains with my department. I commit to collaborating with the automation team to maintain the automation and meet our uptime goal. This commitment extends to ongoing responsibilities, including but not limited to: testing, implementing enhancements, handling break-fix scenarios, managing application upgrades, and supporting process changes or improvements as required.

3.2 Future Initiatives

Below is a list of future operational, technical, or known application changes that may impact the automation

- After completion of project delivery, the team would like the capability to take a collection of aged accounts, send an additional input file for bot to go status these targeted accounts

3.3 Downtime Plans

Below are the actions the operational team will take in the event of automation downtime

Scenario	Actions (taken by operations)	Contact
Level 1 <i>Downtime = 1-2 days</i>	- Supervisor review – special project assignment - Engage with Isaac if password-related	marisol.plantenys@northside.com jacqueline.williams@northside.com chris.byrd@northside.com isaac.howard@northside.com
Level 2 <i>Downtime = 2-7 days</i>	- Staffing assignments need to change - Identify and reach out to vendor support	rhoda.dozier@northside.com corey.taylor2@northside.com richard.mageau@northside.com jake.richards@tarponhealth.com joe.sanda@tarponhealth.com lisa.martino@tarponhealth.com
Level 3 <i>Downtime = 7-14 days</i>	- Staffing assignments need to change – possible overtime - Continue engaging vendor support	michelle.ivie@northside.com marisol.plantenys@northside.com jacqueline.williams@northside.com chris.byrd@northside.com
Level 4 <i>Downtime = Indefinitely</i>	- Establish long-term staffing changes - Establish long-term solutions and plans with vendor support	isaac.howard@northside.com rhoda.dozier@northside.com corey.taylor2@northside.com richard.mageau@northside.com jake.richards@tarponhealth.com joe.sanda@tarponhealth.com lisa.martino@tarponhealth.com

3.4 Revisions

Complete the table below for any document revisions

Rev. #	Date	Section/page	Revision summary	Author