December 10, 2024

Developer - RPA

RED SKY HEALTH

Appeal Automation BOT

Elevated health

Elevated health

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# Project Details

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| --- | --- |
| Project Type | Appeal Automation |
| Client Name | Rume Medical Group, Elevated Health |
| Project Manager | Sanjith Nair |
| Developer | Arun Kumar |
| Developed Platform | UiPath |
| Kick-Off Date | 10/7/2024 |
| Live Date | 10/28/2024 |

# Project Overview

A robust UiPath Robotic Process Automation (RPA) solution to automate the repetitive and time-consuming task of checking claim statuses within CollaborateMD. This automation streamlines the revenue cycle management process, reducing manual effort and improving operational efficiency.

**Objectives**

* Automate claim status verification for multiple insurance providers
* Minimize manual data entry and reduce human error
* Accelerate revenue cycle management processes
* Provide real-time tracking and reporting of claim statuses

**Key Features**

* Automated login to practice management suite
* Dynamic claim status retrieval across multiple insurance carriers
* Error handling and logging mechanisms
* Export of claim status results to a designated spreadsheet

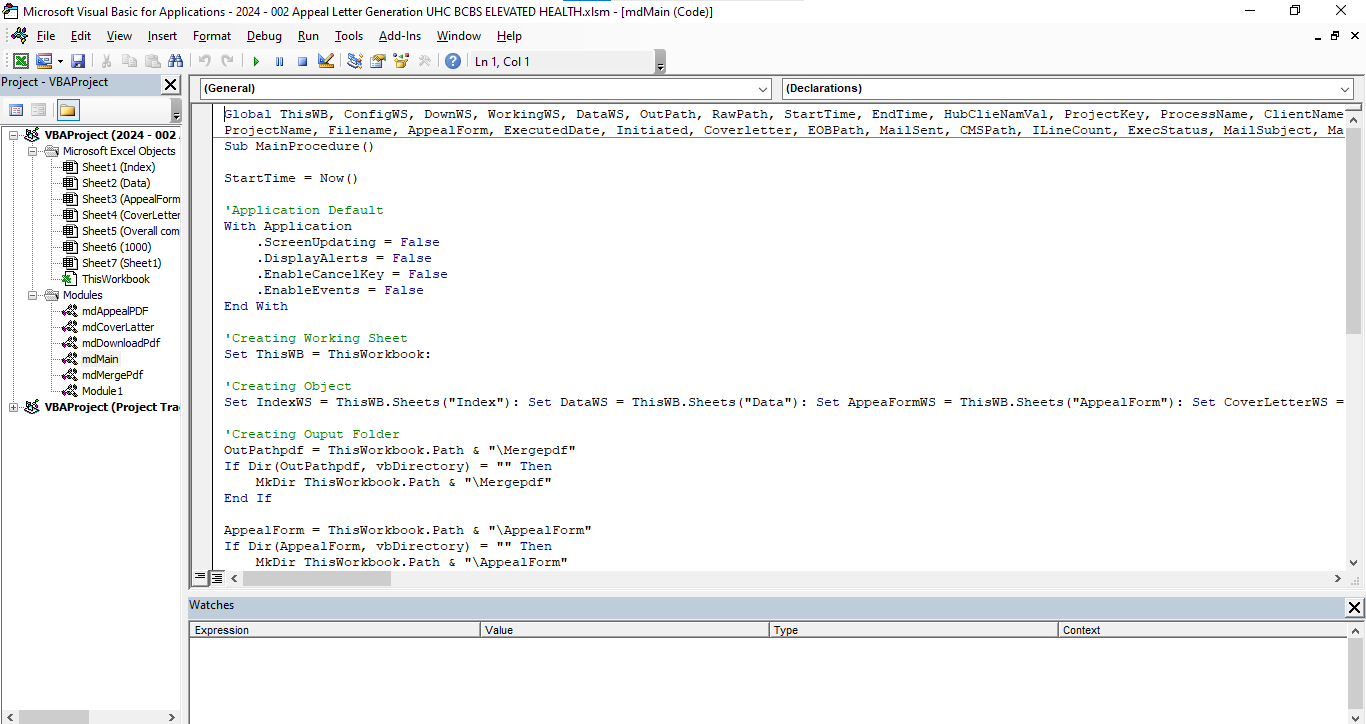
# Input

Input data is needed in the spreadsheet format embedded below.

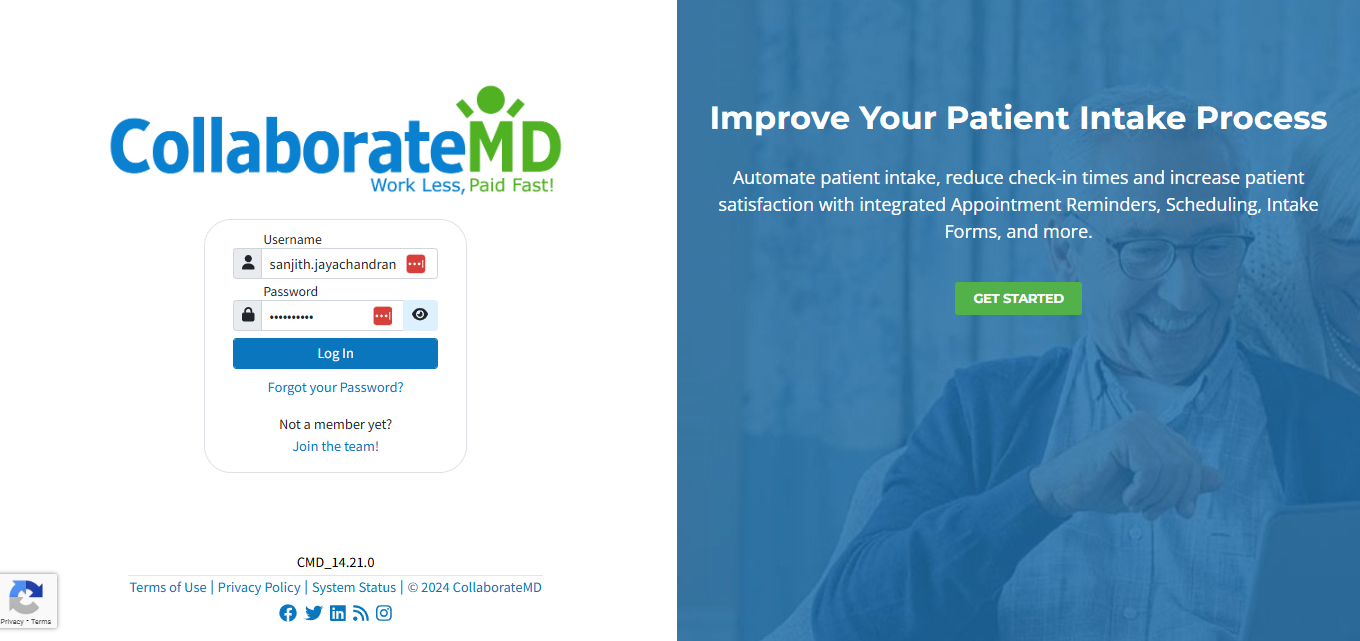


# Execution Steps

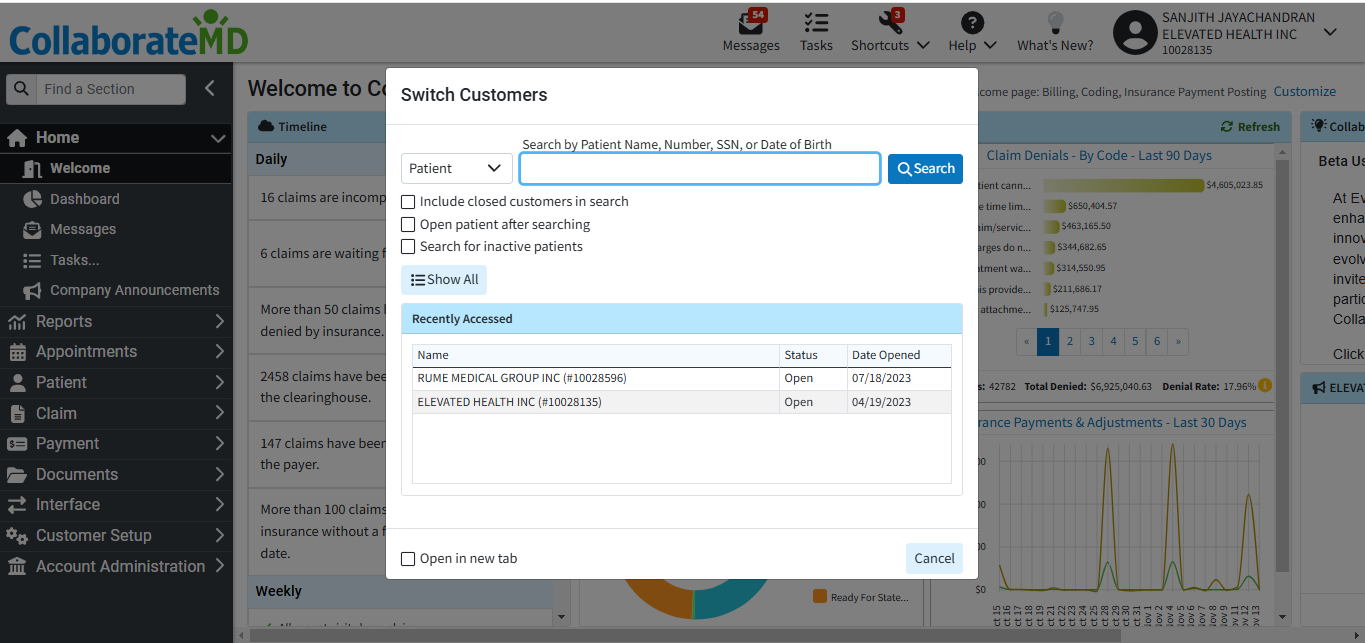
**Step 01:** Open to VBA IDE

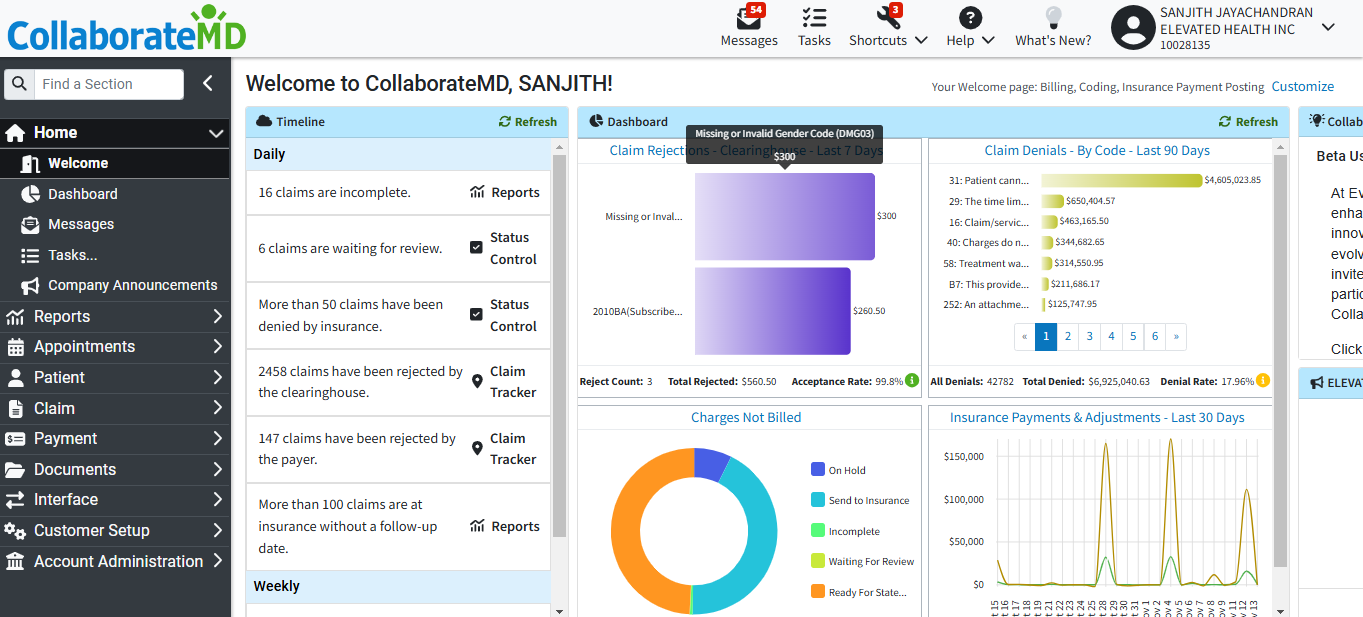
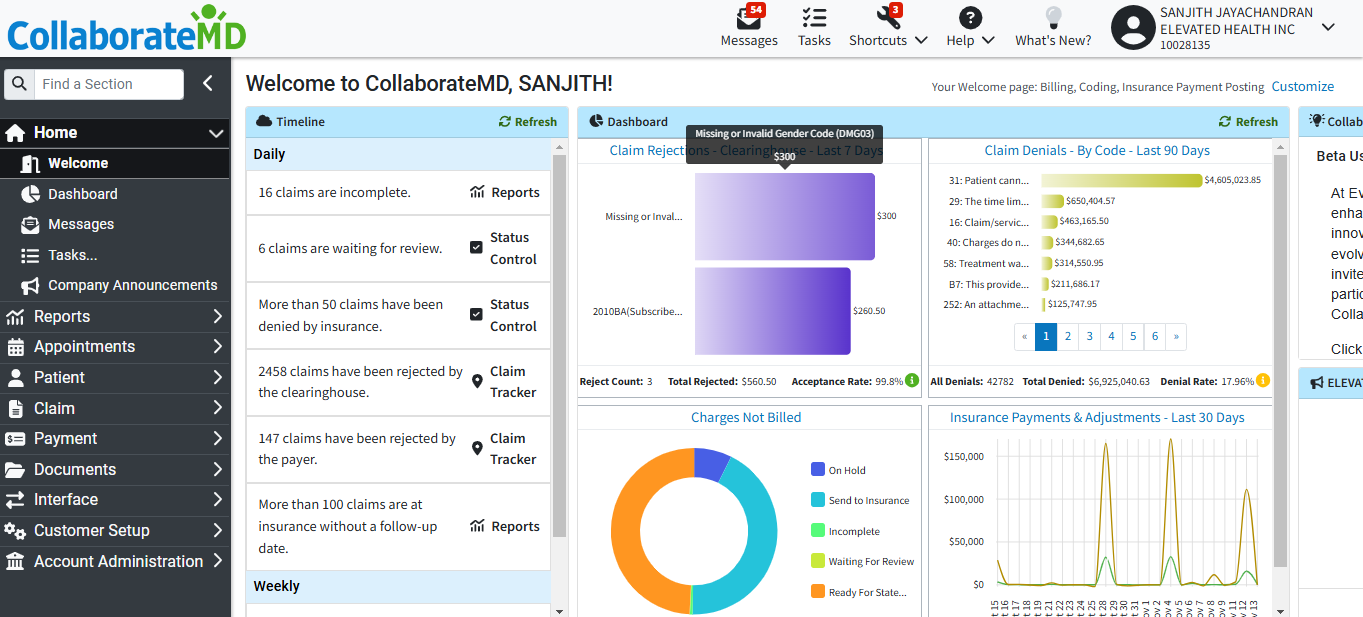


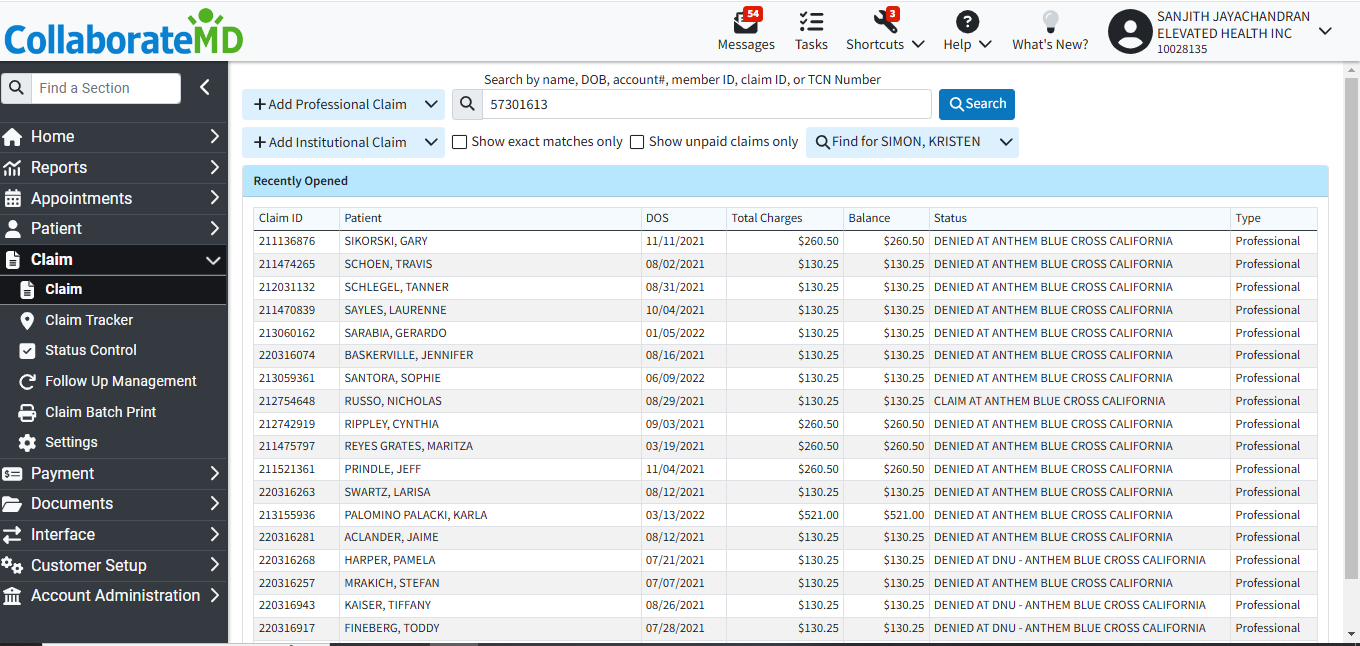
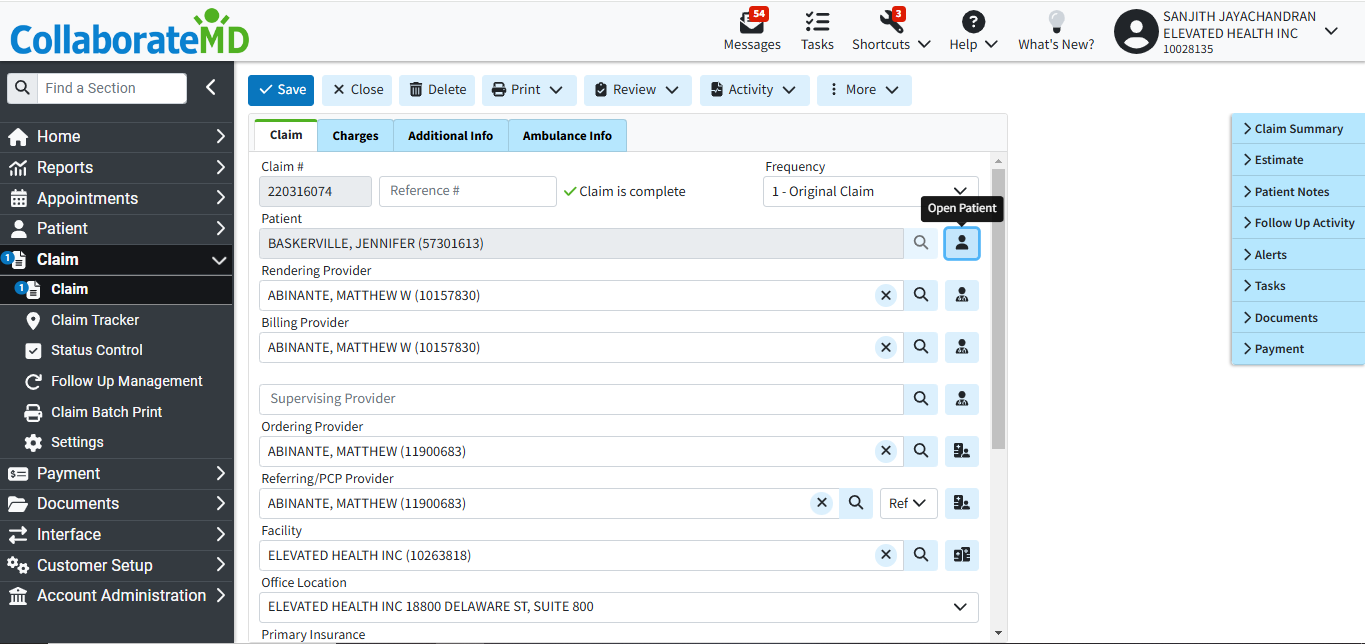
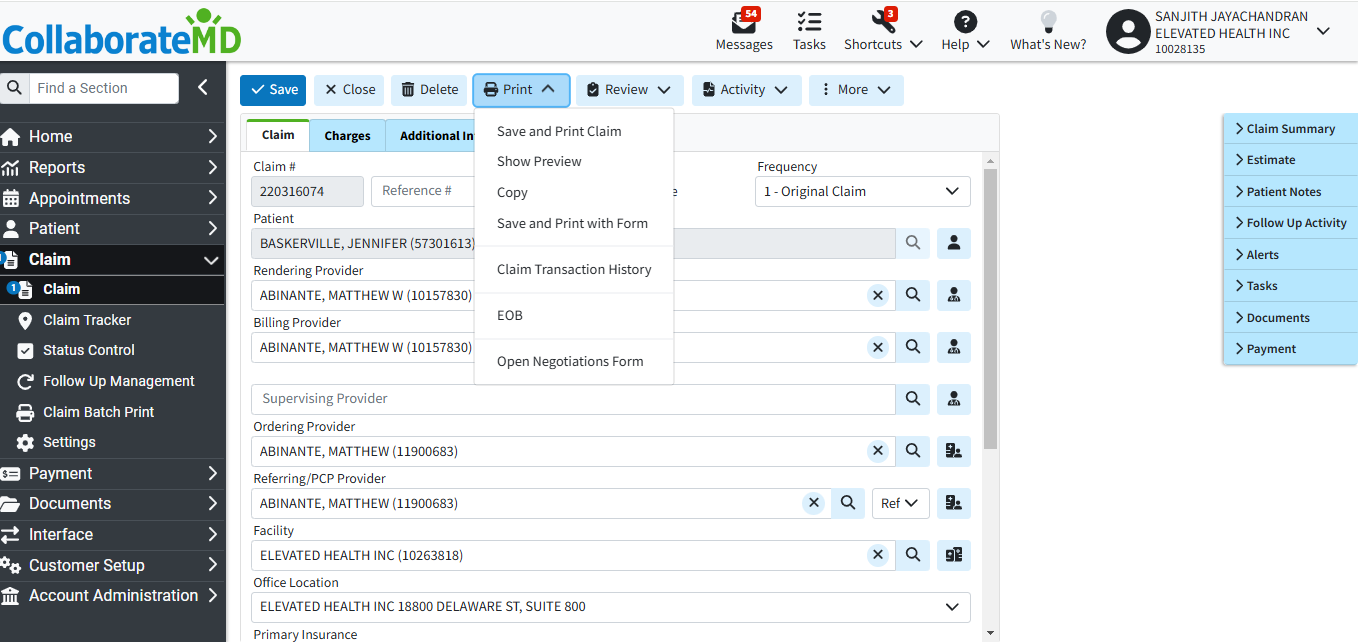
**Step 02:** login to Page Webpage

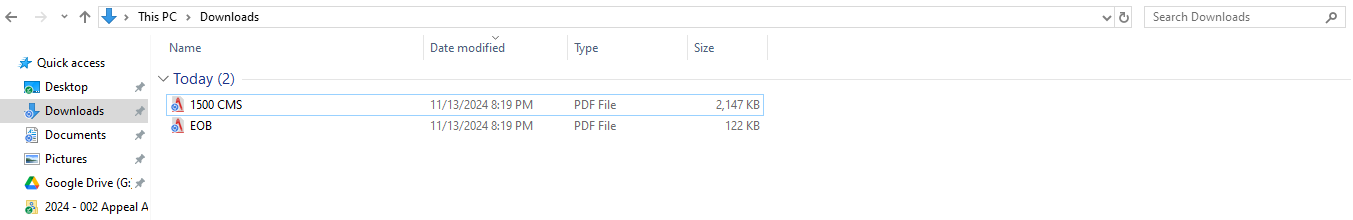
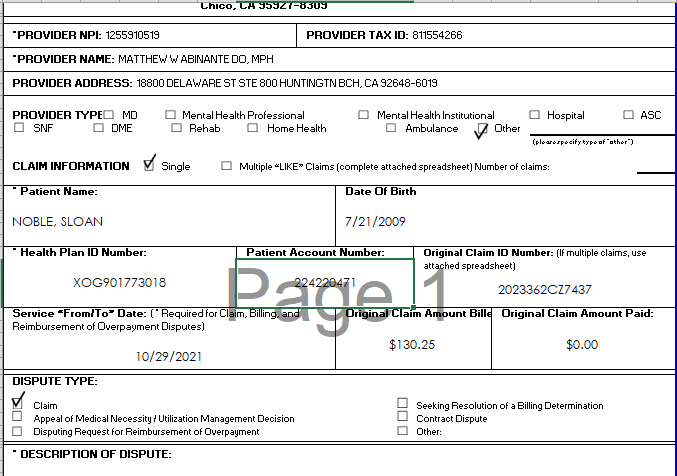
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**Step 03:** Select to client location



**Step 04:** Click to Claim  
****

**Step 05:** Search to Claim ID **  
  
Step 06:** Opento Claim ID Click to Print **  
  
  
  
  
  
  
  
  
  
  
Step 07:** Click to show Preview & EOB click to Print to Download PDF’s **  
  
Step 08: Save the pdf File Download folder**

****  
  
**Step 09:** add the information to the Excel cell and include it in the PDF appeal letter. ****

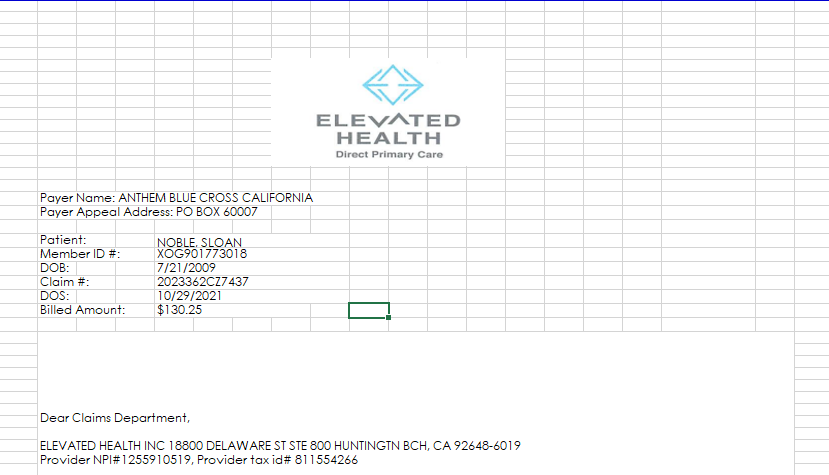
Patient Name   
Date of Birth

Health Plan ID Number

Patient Account Number

Original Claim ID Number

Service Date

**Step 10:** add the information to the Excel cell and include it in the PDF CoverLetter  
 ****

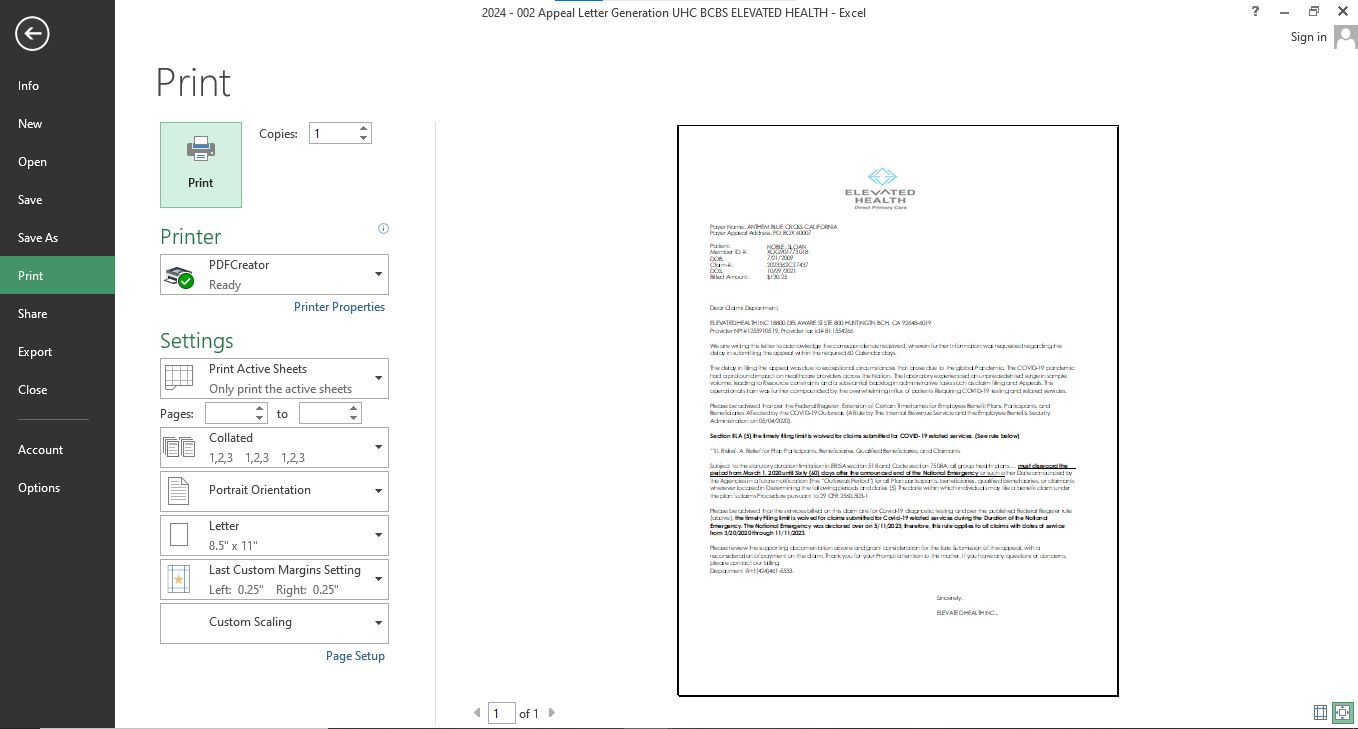
Patient Name   
Member ID

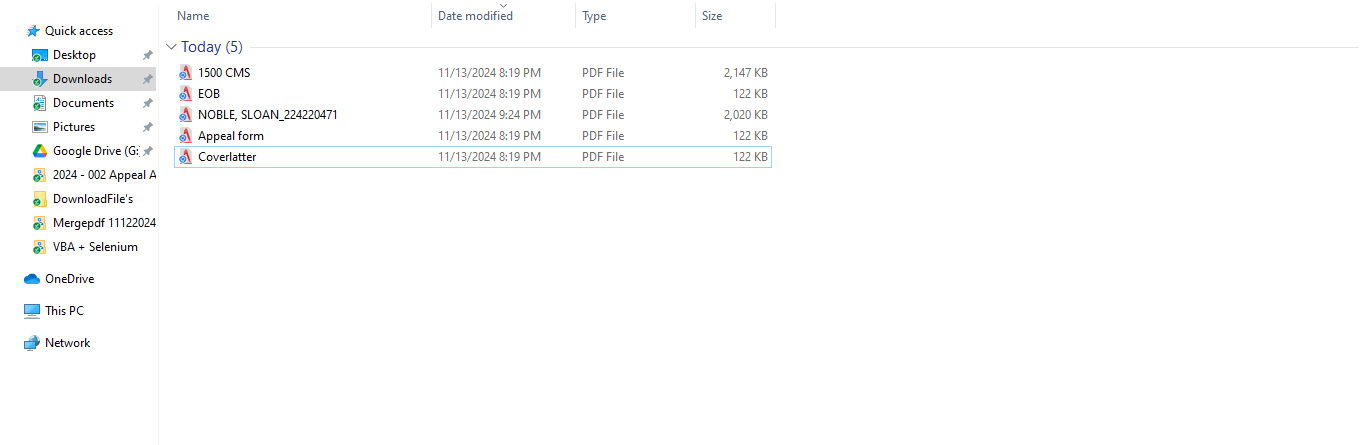
DOB

Claim ID

Billed Amount

Service Date

**Step 11:** add the information to the Excel cell and include it in the PDF CoverLetter ****

**Step 12:** merge to pdf file’s save to Folder Name & Claim number  
  
  
  
Output

The output would be saved in the bot's same location path.