# Updating PMS records using RPA

## Behavioral healthcare company

Created customizable RPA bots to update transactional details and patient/insurance details of over 550K records through a browser-based Practice Management System

# Behavioral healthcare company needs to update PMS Records using RPA

**Picture this...**

You're looking to update the Practice Management System (PMS) to write-off payments and update patient/insurance details for over 500K patients before sending to the collections agency.

**You turn to Accordion.**

We partner with your team to create customizable RPA bots to update transactional details and patient/insurance details of over 550K records through a browser-based Practice Management System, including:

1) Identifying long overdue (over 120 days) outstanding patient balances for active and inactive buckets.

2) Developing an RPA process using UiPath to write-off the records automatically on the PMS system so that the accounts can be transferred to the collections agency.

3) Creating an update log in the RPA process to track the progress and success rate of the write-offs.

4) Developing an RPA process using UiPath to update patient and insurance details on the PMS system so that accurate information could be shared and utilized by the collection agency.

**Your value is enhanced.**

You have identified written-off receivables for ~450k records with ~95% success rate by deploying 10 robots running in parallel. You have updated patient and insurance details for ~350k records utilizing RPA processes running in 16 systems in parallel. You have also helped in transferring over $45 million worth of pending payments to collections agency and saved ~35,000 FTE-hours annually.

**KEY RESULT**

- ~$45M worth of receivables captured
- Saved 35,000+ manhours
- ~95% success rate

**VALUE LEVERS PULLED**

- Robotic Process Automation using UiPath

ACCORDION

# Updating PMS records using RPA for behavioral healthcare provider

## Situation

- Client leverages a collections agency to follow-up on pending payments. However, the client needed to update its Practice Management System (PMS) to write-off payments and update patient/insurance details for over 500K patients before sending to the collections agency
- Partnered with the client to build an automated process leveraging Robotic Process Automation ("RPA") tools to write off long-standing overdue payments and update patient & insurance details on the PMS system

## Accordion Value Add

- Identified long overdue (over 120 days) outstanding patient balances for active and inactive buckets
- Developed an RPA process using UiPath to write-off the records automatically on the PMS system so that the accounts can be transferred to the collections agency
- Created an update log in the RPA process to track the progress and success rate of the write-offs
- Developed an RPA process using UiPath to update patient and insurance details on the PMS system so that accurate information could be shared and utilized by the collection agency

## Impact

- Written-off receivables for ~450k records with ~95% success rate by deploying 10 robots running in parallel
- Updated patient and insurance details for ~350k records utilizing RPA processes running in 16 systems in parallel
- Helped in transferring over $45 million worth of pending payments to collections agency and saved ~35,000 FTE-hours annually

# Overview of solution approach
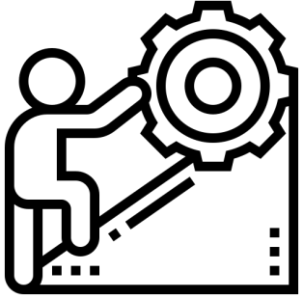
**Major Challenges**

To update write-off payments and insurance details for a patient record on client's Practice Management System, the team needed to:
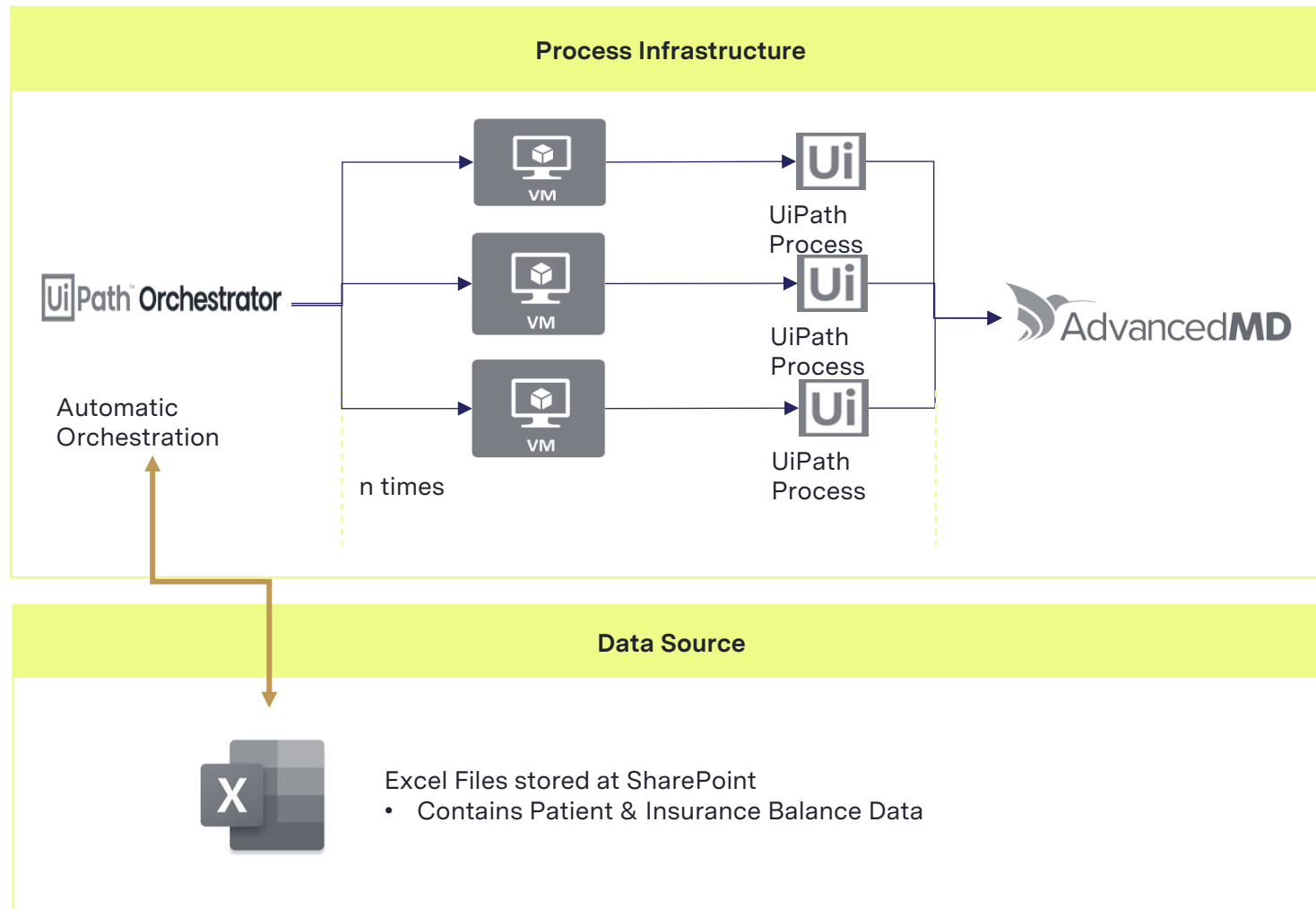
- Navigate the website, read data, update data, and update a success log **in the shortest possible time**

- Handle **uncertain pop-up windows** after clicking on patient name

- Navigate to the patient information from **a drop-down list**

- Click on the relevant row in website tabular data **based on the values in other columns**

- Handle the errors for some patients **with amounts different from input sheet**

**Solution**

- **Created an RPA code in UiPath** and deployed 20 bots to run the workflow 24*7 with **utilization of greater than 90%**

- **Handled pop-up windows** by deploying logic to close the pop-ups on case-to-case basis after every click

- Changed logic to search for patient with a unique ID, **resulting in only one name in drop-down list**

- **Deployed dynamic variable selectors** to navigate to the required row in website tabular data based on column values.

- **Deployed "try-catch" logic for error handling** in case of mismatched amounts

- Configured **SharePoint connection** to regularly track the process status.

# Process infrastructure to update PMS records

## Process Infrastructure



UiPath Orchestrator

Automatic Orchestration

n times

UiPath Process

UiPath Process

UiPath Process

AdvancedMD

## Data Source

Excel Files stored at SharePoint
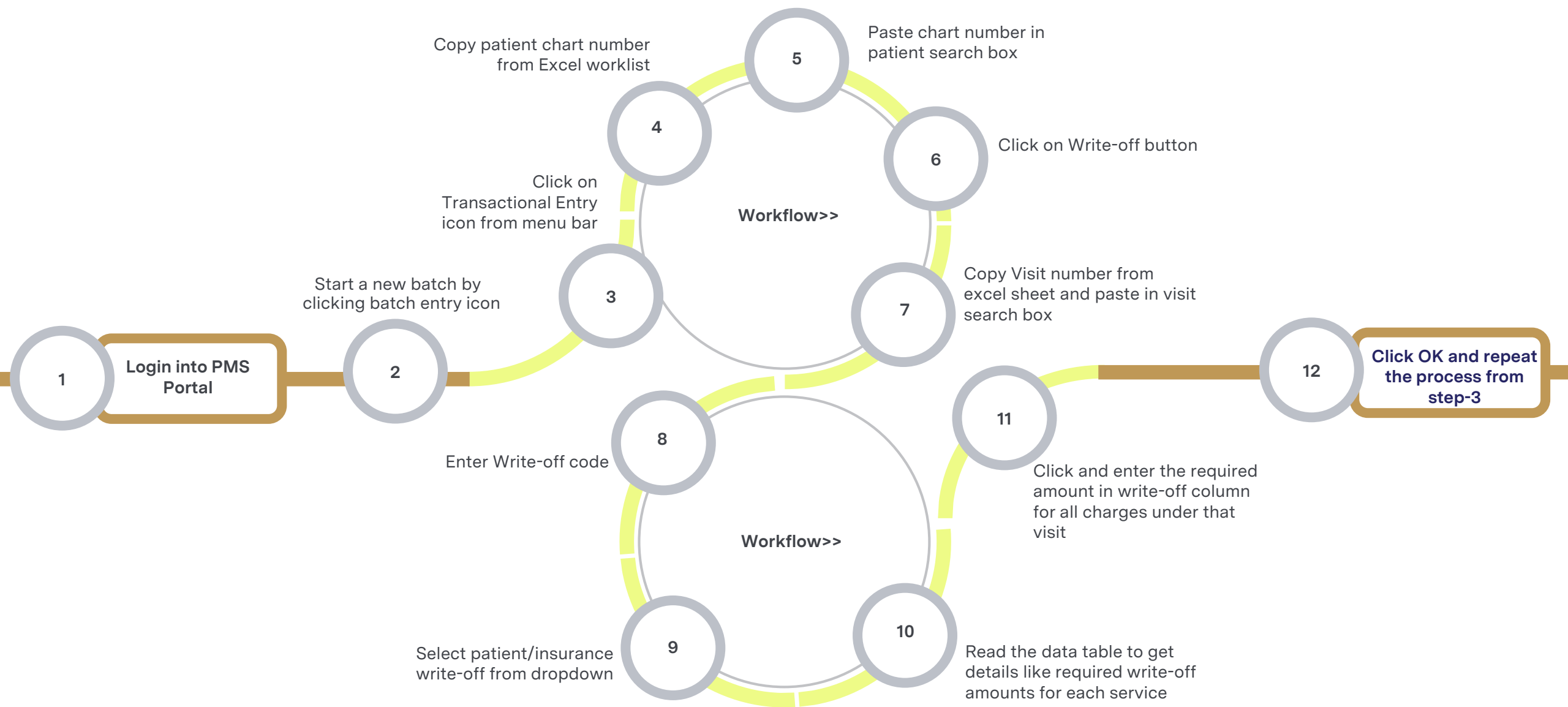- Contains Patient & Insurance Balance Data

## Methodology

**Process Flow**

- **Multiple UiPath VMs** were configured to run RPA process parallelly. They were triggered automatically using cloud-based Orchestrator to update AMD portal.

- Each VM would use a UiPath enterprise version license and would run a UiPath process upon triggered

- Each RPA process would update AMD based on input coming from excel file stored at SharePoint containing patient and insurance balance data

**Tools Required**

- **Azure VMs** was required to run RPA process to operate ~20K records per week

- **UiPath Enterprise license** was used to run the processes

# Payment write-off workflow in PMS



Copy patient chart number from Excel worklist

Paste chart number in patient search box

Click on Transactional Entry icon from menu bar

Click on Write-off button

**Workflow>>**

Start a new batch by clicking batch entry icon

Copy Visit number from excel sheet and paste in visit search box

**Login into PMS Portal**

1

2

3

4

5

6

7

12

**Click OK and repeat the process from step-3**

Enter Write-off code

8

11

Click and enter the required amount in write-off column for all charges under that visit

**Workflow>>**

Select patient/insurance write-off from dropdown

9

10

Read the data table to get details like required write-off amounts for each service

# Daily process status emails

Write Off update run status

L To

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

📄 Consolidated_Status_file.xlsx ⌄
11 KB

| | Value | Percentage % |
|---|---|---|
| **Total Status** | | |
| Total Records | 143163 | |
| Total Records Ran | 89487 | 62.51% |
| Total Success | 87225 | 97.47% |
| Total Failures | 94 | 0.11% |
| Total Exceptions | 2168 | 2.42% |
| **Daily Status** | | |
| Today's Records Ran | 4591 | |
| Today's Success | 3873 | 85.42% |
| Today's Faliures | 94 | 2.07% |
| Today's Exceptions | 624 | 13.76% |

**Daily status email** generated through automated process