**UHC Discussion 29/02/24: Key Takeaways**

* **Data Source and Formats:**
  + The primary source of truth resides in the Oxford Book of Business, accessible via Bartrack in tabular format.
  + The Excel spreadsheets within Bartrack exhibit varied formats across different groups, posing challenges in uniform data extraction.
* **Exploring LLMs and Gen AI:**
  + Utilizing Language Model APIs (LLMs) and Generative AI is encouraged to address the issue of inconsistent source formats.
  + However, potential limitations concerning Personally Identifiable Information (PHI) and other policies must be considered. Understanding UHC’s stance on policies related to generative AI is essential before implementing them in our proposed solution.
* **Excel Workbook for Groups and Plans:**
  + An Excel workbook containing information on all member groups and their respective plans is available.
  + This workbook serves as a valuable resource for estimating the total number of member groups and benefit plans.
  + It also aids in identifying and filtering out active plans due for renewal, with data extracted from active interim reports.
* **Benefit Plans and Group Dynamics:**
  + There are presently 331 benefit plans in total. Each group may utilize multiple plans, sometimes reaching up to 100.
  + Renewal dynamics vary among member groups; some plans may not be renewed annually due to discontinuation or introduction of new plans based on organizational needs. Notably, there is no formal notification process for mid-year changes made by member groups.
* **Automation Criteria:**
  + Initial automation efforts involve filtering groups and associated plans based on renewal dates.
  + However, specific criteria are necessary for selecting member groups whose plans require auditing for the month.
* **Data Verification and Validation:**
  + Our priority is to filter group members and their associated plans. This involves retrieving associated values by querying the CIRRUS system and conducting similar extractions from other sources of truth.
  + Subsequently, a report will detail audited groups, their plans, and extracted values, highlighting discrepancies or mismatches.
  + Manual checks will supplement this process to ensure thorough verification.
* **Risk Mitigation:**
  + In the event of a last-minute renewal, the automation process must be robust enough to operate within a 5-7 business day window leading up to the renewal deadline and continue running afterward.
  + This approach ensures effective capture of outliers or late changes, with the bot capable of daily refreshes and capturing outliers post-renewal dates.
* **Implementation Strategy:**
  + To mitigate the risk posed by last-minute renewals, clients can provide a list of group names in an Excel sheet.
  + This list facilitates identification and validation of plans even after the renewal date has passed.