**Day 1- UHC process walkthrough – Notes**

The values for the Non-Standard plans in the CIRRUS production system need to be audited against the BarTrack Reports- the source of truth.

The auditing needs to be done 15-20 days before the renewal of the plans. The ID cards are released on the 15th or 16th of every month.

The ID cards contain fields which need to be audited. We can also expand the fields beyond those that are in the ID cards that we have to audit during the automation. Auditing needs to be done for member groups whose renewal is coming.

The ID cards are generated from the CIRRUS data. The source of truth has to match with whatever is in the CIRRUS system.

The Source of Truth here refer to BARTrack Reports. These are put into place by the Sales team to check if certain negotiated plans are configurable or feasible in their system.

**Manual Audit Process:**

1. **Access USP Plans Active and termed database link from CIRRUS:** This is an extract from CIRRUS which contain details of active member groups, benefit plans and effective renewal dates.
2. **Filter the MNS (Medical Non Standard) plans:** From the Active report, the user has to filter only the MNS plan data. MNS plans are specifically tailored/customized to the needs of each member group.
3. **Download the active report in CSV format:** This will give us the names of groups which we need to audit.
4. **Open the downloaded file and filter on Book of Business:** Notate what all Book of Businesses we have
5. **Filter on Plan ID column and input MNS in the search bar**
6. **Filter on CONTRACT OPT EFF DATE column and uncheck the Select All checkbox:** Select appropriate month check box which you want to audit
7. **Select and copy all the values in the Plan ID column and paste them in a new sheet**
8. **Click on the Data tab and ‘Remove duplicates’**
9. **Verify SITUS STATE column and notate the State values (example: NY, NJ, CT)**
10. **Click on the 2nd tab in the excel file where the benefit plans are pasted**
11. **Input the corresponding State values next to each benefit plan:** Now we know what plans need to be audited and for what States
12. **Access CIRRUS benefit configuration sharepoint:** In the CIRRUS benefit configuration sharepoint, scroll to Non Standard Plan Documents section and click on the appropriate BARTrack icon (currently there are CT BARTrack, NJ BARTrack, NY BARTrack)
13. **Click Open in Desktop from the pop up box if applicable**
14. **Toggle back to the active detail file where we have the list of plans and state**

**Day 2: Audit process continued:**

The user toggles to Active detail file where the list of plans and states are stored, and notates the appropriate plan number (CIRRUS plan ID) which needs to be audited and the member group name for the corresponding benefit plan.

After making note of all the information that the user needs, they toggle back to the appropriate MNS BarTrack Report File (Source of Truth) and search for the appropriate group or plan within the file. At this point, the user knows the member groups that are going to renew.

User can perform the audit in 2 ways:

1. Open the Benefit Plan in CIRRUS and perform the audit
2. Open PowerBI to perform the audit

The powerbi file contains information extracted from CIRRUS.

*(In the source of truth, the MNS plans have been organized statewise- for instance, CT BarTrack, NJ BarTrack, NY Bartrack. So the CT Bartrack report will only contain member groups from Connecticut, and so on.*

*The current 4 books of business are: Oxford, Tufts, Level Funded, Fully Insured.*

*Each of these books of business have a set of plans which are again organized state-wise. However the format across the member groups and books of business is inconsistent. Plan details can be in the form of spreadsheet tables, images or PDFs. Some plan details have also been observed to be in the form of embedded objects in the bartrack report excel file.*

*The ID cards are released 15 days before renewal typically. The user typically reviews all MNS plan every month regardless of their status. )*

The powerbi link contains details of all the MNS plans that are in the CIRRUS system. These values are checked against the Source of Truth.

*(These are values that are proposed to the groups which can change year to year. The Source of Truth will contain recent values. In the PowerBI data, plans having the year as 9999 are the ones that don’t have any expiry date as of now, meaning they are currently in place.*

*MNS plans are specifically tailored for just one group, so there is only one MNS plan for one group)*

If the audit the passes, the user accesses CoPE PGA Sharepoint Link and adds metrics.

Now, if **‘urgent care’** (one of the ID card values) is not listed on the MNS form, then it means that the urgent care for that member group follows the standard plan. The similar standard plan whose value will be followed can be tracked using a tracking ID.

Example of standard plan ID: KACTOHP58

Example of MNS plan ID: MNS0000026

Standard Plan details are stored in the **Portfolio Grid** in a consistent format**.** The tracking ID will be used to find the appropriate standard plan value which will be considered for the concerned MNS plan.

The information on CIRRUS is queried from backend SQL tables.

**Day 3**

There are 40-45 fields that need to be audited. The fields are consistent across states and books of business.

About 10 different SQL queries are used to query all the required data from the CIRRUS system from over different 20 tables.

The data can be extracted either by queries from tables or by web scraping the UI in the CIRRUS system. However, web scraping is not suitable since the sites can get updated which will change the dynamics of the data.

Plan IDs in the format “MNSXXXXXXXX” represent the MNS plans.

Some MNS plans are built from scratch hence there may not be a standard plan to link it with.

The client already has the queries written to extract the CIRRUS data. The main hurdle is to extract the data from the BarTrack because of the inconsistent format.

The BARtrack reports are not the real source of truth. The Sales team do not directly fill the BARtrack reports.The BARtrack reports is a compilation of all the plans and benefits to member groups stored in the form of a central repository.

If there are inconsistencies between the CIRRUS and the BARtrack values, the incorrect values can be audited and fixed, or it can be flagged as an error.