**Business Requirements Overview**

-Script will pick up files from folder and run process to create the files below.

-The Visits file should always show data from 1/1/20 forward.

-The data and screenshots below are from Interfaith but the process for Wyckoff will be the same.

**Folder Locations and File Names**

Graphical user interface, application

Description automatically generated

**Input Files**

Html Files: ex 01312021xxxxxxxxx.txt

Visits Files: ex Visits\_rundate [ex Visits\_041821]

**Output File**

-Output file will be stored in the “End Results Files” folder with following naming convention.

“SPARCS Compliance Analysis [Run Month] (created from HTML and Visits file).”

-Output file will have multiple tabs:

* **Tab 1:** Client Monthly Sparcs Summary (Summary count by “Sparcs Status” and Sparcs Claim).
* **Tab 2:** Client Monthly Sparcs Rejections (Summary count by Error Message Text sorted from high to low by count).
  + Add note on tab indicating “this includes Sparcs Submission Errors only; EHR may contain additional compilation errors.” This is so clients do not think this file includes all EMR (electronic medical record) errors.
* **Tab 3:** Client Sparcs Rejections (List all accounts with status of “Rejected” inclusive of all available data).
* **Tab 4 (a and b):** Client Sparcs “Not Submitted” (Accounts that are neither “Accepted” nor “Rejected” will be assigned a status of “Not Submitted.” List all of these accounts inclusive of all available data).
  + FB Not Submitted
  + BD Not Submitted
* **Tab 5:** Client Sparcs “Accepted” (List all accounts with a status of “Accepted” inclusive of all available data).
* **Tab 6:** Client “Data Detail” inclusive of all accounts, data fields are Account Number, Admit Date, Discharge Date, Service Date, Bar Status, Account Type, Primary Insurance, Sparcs Claim, Sparcs Status (Accepted, Rejected, Not Submitted), Error Msg Text, Error Code. (Confirm with Nate).

**Business Requirements**

Read html files into pandas dataframe (multiple files)

* Handle changing date format on files.
* Add new column for “month.”
* Add new column for “file name.”
* Pull Accepted and Rejected.
* Pull the first Error listed. Example of account with multiple errors below. Store Segment, Code, Location and Message from the “Errors and Messages Found in This Unit” section.

Graphical user interface, text, application

Description automatically generated

* Use the map from file “Error\_Message\_Text\_Map\_042021” to add 2 fields to the dataframe “Error Department” and “Error Msg Text Department” (Will confirm with Nate on this).
* Use field “Message” and a Count to create Tab 2.

Graphical user interface, text, application, email

Description automatically generated

**Visit File (txt file)**

* Read txt file into dataframe.
* From html file, add Segment, Code, Location, and Message to visit file.
* From html file add Disposition column to visit file. Rename Disposition header to “Sparcs Status.” Both files use AccountNumber.
* In column “Sparcs Status” change “#N/A” values to “Not Submitted.”
* Use “Not Submitted” values from “Sparcs Status” column and “BarStatus” to create Tab 4 (and b).
  + FB Not Submitted
  + BD Not Submitted
* Use visit file dataframe to create dashboard by Sparcs Status, Account Type and Month.
* Output File Name: SPARCS Compliance Analysis [run month].

Table

Description automatically generated

* Example of completed workbook with additional worksheets below.

Table, calendar

Description automatically generated

* We will need files for each month (ie Jan, Feb, Mar etc) inclusive of only that months data, as well as a running YTD file inclusive of all data.