**Purpose**

Operational workflow for supporting charge Interface issues.

**Identifying the Issue**

Please see noted below the various ways that charge interface issues can be identified.

* 1. **Revenue Integrity Operations (RIO) team identifies issue through Daily Charge Summary Report**
     1. No batch
        + Check for EAI email notification
          1. If email sent – RIO will add to daily email that issue exists and has been flagged
          2. No email sent – RIO will email site reconciliation contact to check to see if any charges are on the ancillary charge reports
        + If charges exist on the ancillary charge reports – RIO will open ticket with *Project Access – App Integration*
     2. Volume trend
        + RIO will assess the volume trend by doing a pivot from the Daily Charge Summary report. This will include daily averages for each ancillary with an alert based on a set +/-.
        + Check for EAI email notification
          1. If email sent – RIO will add to daily email that issue exists and has been flagged
          2. No email sent – RIO will email site reconciliation contact to check to see if any charges are on the ancillary charge reports that do not exist in Soarian
        + If there are charges on the ancillary charge reports that do not exist in Soarian – open ticket with *Project Access – App Integration*
  2. **Site/Dept resources identifies issue through Daily Charge Reconciliation review**
     1. No batch
        + Notify the RIO team and they will follow the process noted above
     2. Discrepancy between #s sent from ancillary vs #s received in Soarian
        + The site/dept to confirm they correctly pulled their reports and batch times are correct
        + Notify the RIO team and RIO will follow the process noted, where they check for EAI email notification:
          1. If email sent – RIO will add to daily email that issue exists and has been flagged. RIO will not open a duplicate ticket if they already know the issue was identified.
          2. No email sent – RIO will verify the discrepancies noted by the site reconciliation contacts. If there are charges on the ancillary charge reports that do not exist in Soarian – open ticket with *Project Access – App Integration*.
  3. **EAI team sends out a ‘No DFT Activity alert’ email (Ancillary🡪Ensemble)**

1. EAI Team has implemented a "NO DFT Activity" Alert for each ancillary to notify when no DFT messages have been processed by Ensemble within a 24hr period for that respective ancillary. EAI Team sends "NO DFT Activity" emails to distribution lists, not to individuals and will open up an incident ticket for the respective ancillary to investigate.
   1. **EAI DFT Activity alerts or Record Count Functionality (Ensemble🡪 Openlink)**
      1. EAI has modified existing location of alerts to accommodate Ensemble -> OPENLink message flow
         * No DFT activity will be monitored when Scheduled Task to create batch is initiated
           1. If No DFT activity is identified, GMS team will follow same process today as described above 3a.
         * If DFT activity is identified, then EAI will proceed by checking *Record Count Functionality*
           1. The Record count functionality process will confirm Scheduled Task ran correctly and identify number of records to be sent in the batch to Soarian.
           2. An alert will generate to our GMS team when there is  a mismatch of records.  EAI team created code to compare the number of records processed when the job ran against the number of records sent in the batch to Soarian. When this alert triggers, GMS will have their level 2 on call developer reach out to *Project Access – App Integration* the following business day (around 8am) to discuss next steps around resending the missing transactions.
   2. **Project Access – App Integration is receiving alert notification for STREAM issues**
      1. Backlog
         * If Transaction gets stuck in stream, App INT will get alerted if backlog is over 100
         * App INT can skip that message and inform ancillary of the skipped message to re-send
         * EAI-GMS sees a backlog in openlink to Soarian they will open up a ticket for App INT
      2. Interfaced stopped
         * If interface is stopped, App INT would contact Cerner to recycle the interface
      3. Communication will need to go out to impacted teams
   3. **Project Access – App Integration is receiving alert notification for Openlink issues**
      1. Backlog
         * If Backlog issue in Openlink App, then App INT gets notified
      2. Connection issue between Openlink🡪STREAM
         * App INT gets notified and works with Cerner and Openlink team to resolve
      3. Communication will need to go out to impacted teams
      4. Currently these do go out as part of High Impact outage notices

**Tracking the Issue**

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| ***RIO team identifies issue through Daily Charge Posting Summary Report***  ***Site/Dept resources identifies issue through Daily Charge Reconciliation review*** |

1. RIO team to open CA service desk P3 Incident ticket with *Project Access – App Integration*
2. *Project Access – App Integration* team will validate stream
   1. No batches, check stream to validate no batches came through
   2. Partial batches or batch discrepancies? Can review further only if requester provides examples
   3. *Project Access – App Integration* will contact the app owner(s) regarding issue for investigation
      * If ancillary validates charges sent then ticket will be opened for IS Ensemble
      * If ancillary did not send batch, then it is an ancillary issue
3. Awareness: RIO, Patient Accounting & other project teams
4. Communication: App INT to coordinate meeting with all affected teams (Ancillary/RIO/EAI). Will provide oversight to ensure a resolution is met and communicate issue and resolution to site and various stakeholders.

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| ***If issue identified via EAI team DFT Activity alert (Ancillary 🡪 Ensemble)*** |

1. Ticket: EAI team opens incident ticket and assigns to the ancillary
2. Ownership: Ancillary Teams
3. Action plan: To review email on a daily basis and if any errors, Ancillaries will need to investigate from their end since these messages didn’t reach ensemble
4. Communication: Ancillary teams to communicate to all relevant parties the issue and resolution via email

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| ***If issue identified via EAI team DFT Activity alert or Record Count Functionality (Ensemble***🡪***Openlink)*** |

1. Ticket: EAI team opens incident ticket and assigns to *Project Access – App Integration*
2. Ownership: EAI
3. Decision makers: RIO and Ancillary teams
4. Awareness: Patient Accounting & other project teams
5. Communication: App INT to coordinate meeting with all affected teams (Ancillary/RIO/EAI). Will provide oversight to ensure a resolution is met and communicate issue and resolution to site and various stakeholders.

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| ***If issue identified via STREAM Alert notification*** |

1. Ticket: N/A
2. Ownership: *Project Access – App Integration*
3. Action plan: App INT reviews alert for backlog/connection issue and works with ancillary or Cerner to resolve
4. Communication: App INT team to communicate to all relevant parties the issue and resolution

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| ***If issue identified via Openlink Alert notification*** |

1. Ticket: N/A
2. Ownership: Openlink
3. Action plan: App INT reviews alert for backlog/connection issue and works with openlink or Cerner to resolve
4. Communication: App INT team to communicate to all relevant parties the issue and resolution

**Stakeholders**

**Charge issues can impact several teams. If the issue is affecting a single application, *Project Access – App Integration* will work with that Ancillary Application along with EAI & RIO directly, no meeting required. If it is affecting multiple applications the process is different and more coordination/meeting is required. The following Enterprise Contacts need to be kept in the loop for any, and all, charge interface issues:**

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| **Enterprise Contacts** | |
| EAI team | [ISIntegrationSupportGroup@northwell.edu](mailto:ISIntegrationSupportGroup@northwell.edu) |
| Project Access – App Integration | [ISProjectAccessAppIntegration@northwell.edu](mailto:ISProjectAccessAppIntegration@northwell.edu) |
| RIO | RIOSoarianBusinessAnalysts@northwell.edu |
| TOS IT | [Corp-SoarianCDMTesting@northwell.edu](mailto:Corp-SoarianCDMTesting@northwell.edu) |
| Project TOS | ProjectAccessTOSTeam@northwell.edu |
| Project INT | [IS-ProjectAccessIntegration@northwell.edu](mailto:IS-ProjectAccessIntegration@northwell.edu) |
| Project RM | [ProjectAccess-RMTeam@northwell.edu](mailto:ProjectAccess-RMTeam@northwell.edu) |
| Project Leads | [ProjectAccessITPRJLeads@northwell.edu](mailto:ProjectAccessITPRJLeads@northwell.edu) |
| Patient Accounting | [BackRevCycleTechnology@northwell.edu](mailto:BackRevCycleTechnology@northwell.edu) |
|  |  |
| **Ancillary Applications** | |
| Muse | [ISCardiacServices@northwell.edu](mailto:ISCardiacServices@northwell.edu) |
| HSM | [IS-HSM\_Charge@northwell.edu](mailto:IS-HSM_Charge@northwell.edu) |
| SMM | [SCMPharmacy@northwell.edu](mailto:SCMPharmacy@northwell.edu) |
| lab | [IS-LIS HELPDESK IS-LISHELPDESK@northwell.edu](mailto:IS-LISHELPDESK@northwell.edu) |
| SCM RESP | [SCMOrders-Results@northwell.edu](mailto:SCMOrders-Results@northwell.edu) |
| RIS | [ISRadiology@northwell.edu](mailto:ISRadiology@northwell.edu) |
| PK | [PKBusRevCycleTeam@northwell.edu](mailto:PKBusRevCycleTeam@northwell.edu) |

***\*Only reach out to the affected ancillary application(s)***



**RIO will be responsible to contact and keep in the loop the Site/Dept resources currently performing the daily charge reconciliation review. Site reconciliation resources will conduct the final reconciliation validation with RIO oversight.**