

<Client Name> - <Process Name>

Initial Process Analysis

Document Control

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Glossary/Terms/Acronyms:

The following terms, acronyms, and definitions are used throughout this document:

Acronym	Description

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1 Request Summary

<Please provide a 1-3 sentence executive summary of the work being requested.>

<Example: Today our auditors manually look up three data elements for every claim before submission. This check excludes us from bulk writing claims as we have to go one by one to review each claim. We are requesting data be scraped so we can write hundreds of claims at once after the data is pulled efficiently via a robot. >

2 Candidate Selection

<Thinking from a top down approach, how can a computer select the population of records that we want to 'act' on for this request? If you have the SQL filter or a query used today – please also supply it here.>

<Frequently this is the logic a person uses today to identify a population that we will run some process around. Try not to be bound today by what we do as much as use that for a guideline. For example, if we were able to now gather data 100 times faster for example, would we modify our logic for a larger population? Also, if there is no repeatable pattern or logic here. A table can be requested that allows an individual to simply paste in the candidates they would like reviewed and manually kick off the robot.>

<Example: Today the logic we use is “select every member from the Claims Header where the sum of a member’s claims (that have occurred in the last 18 months for our audit lags) is greater than \$100k.” We are only limited by the ability of our team to look up members and today we are able to complete 100 records per resource with a team of three people (300 total). If automation can pull more, please lower the threshold to review whatever number brings us to 10,000 results a day.>

3 Questionnaire

Name of the requestor	John Smith
VP who has responsibility for the team requesting this scrape	Jane Smith
Task ID	
Practice Area	
Operational Area	
Client Name	Aetna
Currently, is there any automation for this task?	No
If 'Yes' to question above, Is the existing automation effective?	NA
Client Environment Details	Citrix
Please list the client system we will be scraping data from (Facets, Highmark, Etc...)	Facets
Operational SMEs for this task/concept	John Doe, Jane Doe
Engineering SMEs for this task/concept	John Doe, Jane Doe
How many FTE are currently required to perform the task manually?	2.8
What is the average task handling time?	10 minutes
Will this task be scheduled or run on demand?	Scheduled
Does the login to client system involve two factor authentication?	Yes
What is the expected candidate volume?	600 per day
How frequently is the source data for the candidate population updated?	Weekly
What is the maximum expected volume?	800
What is the minimum expected volume?	400
Are there any periods when a higher workload is anticipated? If yes, what are they?	No
Has the Global Workforce been leveraged to perform this or any part of this task, or is there a plan to?	Yes
If yes, can the SME be available early in the day to match Global Workforce availability?	Yes
Do you expect to run this task for more than 1 year?	No
If no, for how long? Business reason if any?	6 Months
Who on the home audit will be responsible for running the task? (can be more than one person)	John Smith
Are there any SLAs this solution must conform to?	Yes

What are the SLAs?	Data should be made available by 8.AM EST everyday
Should the solution be expected to recognize an SLA breach? If so how?	No. The engineering team will monitor volumes and processing.
Who on the home audit will be responsible for prioritizing and defining how the results should be presented back to the team? (can be more than one person)	John Smith