

Automation Use Cases

ezBrowser provides the intelligent browser foundation where automation bots perform defined steps across clinical, financial, and operational workflows, reducing manual effort, improving accuracy, and scaling work without adding staff.

Below are real-world automation use cases proven in healthcare environments.

Availity Claim Status Automation Bot

PROBLEM

Revenue cycle teams spend hours manually logging into payer portals, navigating screens, and re-entering claim information slowing follow-up and increasing backlog.

Automation Solution

The Availity Bot operates within ezBrowser to automate claim status inquiries across configured facilities and payers.

What the Bot Does

- Securely logs into Availity using approved credentials
- Searches claim status by facility and insurance
- Supports multiple facilities and payer configurations
- Runs in parallel across multiple workstations for high-volume processing
- Captures claim status results consistently

Outcome

- Faster claim follow-up
- Reduced manual entry
- Increased daily throughput
- Improved staff productivity

WHY THESE AUTOMATIONS WORK

All automation use cases share the same foundation:

- ✓ Executed inside ezBrowser
- ✓ Rule-based and repeatable
- ✓ Exception-driven not blind automation
- ✓ Auditable and traceable
- ✓ Designed for healthcare workflows

This is controlled automation, not fragile scripting.

WHERE AUTOMATION DELIVERS THE MOST VALUE

- ✓ Revenue Cycle & Claims
- ✓ HIM & Document Management
- ✓ Material Management & Supply Chain
- ✓ Accounting & Business Office
- ✓ IT & Operational Support

If the task is repetitive, rules-driven, and high-volume, it's a candidate for automation.

AUTOMATION BUILT FOR HEALTHCARE REALITY

ezBrowser automation is:

- ✓ EHR-agnostic
- ✓ Proven in MEDITECH Expanse environments
- ✓ Designed to work alongside existing workflows
- ✓ Scalable across departments and facilities

PDOC Image Load Bot (Clinical & Financial Document Upload)

PROBLEM

Manually attaching documents to patient accounts is time-consuming, error-prone, and difficult to scale.

Automation Solution

The PDOC Load Bot automates document ingestion and attachment directly into the EHR using defined business rules.

What the Bot Does

- Monitors shared network folders for incoming documents
- Matches documents to patient accounts using file naming rules
- Navigates to the appropriate PDOC/Image section
- Uploads and saves documents automatically
- Archives processed files for audit and tracking

Outcome

- Faster document availability
- Reduced scanning and indexing errors
- Improved HIM and clinical workflows
- Consistent document governance

Note Posting Bot (Automated Note Posting & Validation)

PROBLEM

Manual note posting is inconsistent and difficult to audit especially when errors occur.

Automation Solution

The Bot standardizes note posting while enforcing logging, diagnostics, and error handling.

What the Bot Does

- Posts notes using predefined logic
- Logs every action with date and time

- Captures screen actions, keystrokes, and reads
- Identifies blocked or historical accounts
- Flags failed transactions instead of retrying incorrectly
- Supports rapid troubleshooting with centralized logs

Outcome

- Consistent note posting
- Faster issue resolution
- Improved auditability
- Reduced support burden

Sales Tax Automation Bot (Accounting & Business Office)

PROBLEM

Sales tax data entry across invoices and checks is manual, inconsistent, and difficult to audit.

Automation Solution

The Sales Tax Bot enables structured, electronic tax capture through ezBrowser launched forms.

What the Bot Does

- Launches web-based tax entry forms from EHR screens
- Displays invoice or check context automatically
- Supports itemized and total tax entry
- Applies parish and state tax logic
- Prevents invalid data entry based on business rules
- Audits all changes with user, date, and time
- Stores data in structured tables for reporting

Outcome

- Accurate tax reporting
- Reduced rework
- Improved compliance
- Clear audit trails

READY TO AUTOMATE THE WORK SLOWING YOUR TEAMS DOWN?

Let's review your workflows and identify where automation can deliver immediate impact.

[Request an Automation Demo](#)

