Requesting a Travel Bot

February , 2022

One SOG
Game Plan
Health · Safety · Oversight

Why Use Robotic Process Automation?

- Travel ACT Action Plan

  - Develop use case(s) and pilot Robotic Process Automation to address the following root causes:

    - Elevating and resolving issues that deviate from travel policy prior to traveling.

    - PHE has pinpointed specific issues such as using SUVs or standard size vehicles vs. economy class to maintain safety and as recommended by CDC.

    - Parking that is not within the acceptable range.

    - Lack of awareness of existing standard operations procedures and checklists to follow.

    - Missing documentation when vouchers are submitted.

What is Robotic Process Automation?

What is RPA?

What are bots?

Where does it run?

Software that enables you to create your own digital robots (bots) to automate any business process.

Configurable software that perform the tasks you assign and control. They can interact with any system or application the same way you do and can interact across applications.

RPA bots can either be run from a central, cloud-based platform (scalable for enterprise use) or run locally on your computer.

Travel RPA Use Case Identification

HUMAN-CENTERED DESIGN PROCESS

IMMERSE · IDEATE · IMPLEMENT

INITIATE · SYNTHESIZE · PROTOTYPE

Initiate
- Determined that travel was a pain point for the surveyors.

Immerse
- Shadowed two surveyors as they booked their travel to understand their processes

Synthesize
- Identified pain points with audits and rental car justification

Ideate
- Identified potential automation ideas:
  - Verifying SUVs not ordered
  - Verifying all attachments included
  - Generation of rental car justification (Concur access not needed) - **SELECTED**

Prototype
- Surveyors were solicited to support user acceptance testing from each location.

- Enhancements made based on feedback include changes such as:
  - Including tips in the rideshare costs
  - Calculating and including gas costs for the rental car
  - Adding the standard text for the COVID justification for the rental

Implement
- Started the pilot as of 3/11 with the surveyors who helped in the previous step.
- Feedback and backlog process has been defined and feedback will be actively solicited from the participants
- Additional surveyors will be added on a regular basis, depending on workflow and implementation of Orchestrator

4

Manual Process for Rental Car Justification

1 Look up addresses for airports and facilities

2 Look up rideshare costs, cut & paste screenshot, repeating for each leg

3 Fill out Excel, estimate gas, generate PDF

Total Time = 30-45 Minutes

Automated Process for Rental Car Justification

1 Fill out Excel template, entering "airport", "hotel", LTC CCN, or address for any other location for each leg

Leg	Date	Day	From	To	Surveyor Name
1	3/28/2022	Monday	Airport	105851	Sam Surveyor
2	3/28/2022	Monday	105851	Hotel	
3	3/29/2022	Tuesday	Hotel	105851	
4	3/29/2022	Tuesday	105851	hotel	
5	3/30/2022	Wednesday	hotel	105851	
6	3/30/2022	Wednesday	105851	hotel	
7	3/31/2022	Thursday	hotel	105851	
8	3/31/2022	Thursday	105851	airport	
9					
10					
11					

2 Save and upload the Excel file and Concur Pre-Authorization Itinerary to TravelBotNewRequest folder on Box. Save the Itinerary as an Outlook attachment

Total Time = 3-5 Minutes

Bot Output – Rideshare Cost per Leg

- Bot resolves addresses and using RideGuru* identifies mileage and ride share options for each leg

- Least cost ride share option is identified

Leg	Date	Day	From	To	Mileage	Taxi	Uber	Lyft	Least Cost
1	3/28/2022	Monday	100 Terminal Dr, Fort Lauderdale, FL 33315	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	24.6	$ 65.00	$ 39.00	$ 37.00	$ 37.00
2	3/28/2022	Monday	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	8201 Congress Ave Boca Raton, Florida, 33487	9.2	$ 26.00	$ 16.00	$ 16.00	$ 16.00
3	3/29/2022	Tuesday	8201 Congress Ave Boca Raton, Florida, 33487	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	9.1	$ 26.00	$ 16.00	$ 16.00	$ 16.00
4	3/29/2022	Tuesday	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	8201 Congress Ave Boca Raton, Florida, 33487	9.2	$ 26.00	$ 16.00	$ 16.00	$ 16.00
5	3/30/2022	Wednesday	8201 Congress Ave Boca Raton, Florida, 33487	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	9.1	$ 26.00	$ 16.00	$ 16.00	$ 16.00
6	3/30/2022	Wednesday	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	8201 Congress Ave Boca Raton, Florida, 33487	9.2	$ 26.00	$ 16.00	$ 16.00	$ 16.00
7	3/31/2022	Thursday	8201 Congress Ave Boca Raton, Florida, 33487	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	9.1	$ 26.00	$ 16.00	$ 16.00	$ 16.00
8	3/31/2022	Thursday	6343 VIA DE SONRISA DEL SUR BOCA RATON FL 33433	100 Terminal Dr, Fort Lauderdale, FL 33315	24	$ 61.00	$ 35.00	$ 34.00	$ 34.00
					103.5	$282.00	$170.00	$167.00	$ 167.00

* Taxi estimates are calculated using TaxiFareFinder, which uses real, up-to-date taxi rates from thousands of locales worldwide.

7

Bot Output – Summary Tables

Traveler Name	Sam Surveyor
Date Created	1/21/2023
Assumptions	
Gas Price	$ 4.22
Rental MPG	20
POV mileage reimbursement	$ 0.655
Taxi/Rideshare Tip %	15%
Rental Car Cost	
Rental Car	$ 326.22
Gas	$ 18.74
Total Rental Car Estimate	**$ 344.96**
SUMMARY	
Taxis/Rideshare with Tip	$ 205.85
Rental Car	$ 344.96
Private Car	
Government Car	
Is rental car most	**no**

Rental Car Justification

During the COVID-19 public health emergency, the use of a rental car is necessary to conduct efficient and safe inspections of nursing and/or long-term care facilities. The rental car will be used as a dressing room for staff to change into personal protective equipment before entering the facility, It is also needed to store personal property and equipment before entering the facility. It is also needed to store personal property and equipment since it has been deemed unsafe to bring these items into a nursing or long-term care facility while inspecting a COVID unit.

Bot updates using Gas price for travel state using AAA

Configurable assumption

Pulled from traveler's itinerary

Calculated from total number of miles for all legs, current gas price and rental MPG

Updated as Federal Guideline change

Configurable value

Private car calculation included if no air travel

All values calculated and lowest cost highlighted*

Standard COVID-19 rental car justification added if rental car is not most advantageous

8

*Government car not currently automated

Bot Output File

- PDF which can be submitted in Concur

- Screenshot captured for each leg

Proper Way of Filling the Excel Form; When Your Trip Requires Flying

Use only the words "Airport" and "Hotel"

Add the CCN ONLY for an LTC facility

Add your name here

Leg	Date	Day	From	To		Surveyor Name
1	11/1/2021	Monday	airport	hotel		Sam Surveyor
2	11/1/2021	Monday	hotel	7500 Security Blvd. Baltimore, MD		
3	11/1/2021	Monday	7500 Security Blvd. Baltimore, MD	hotel		**Surveyor Email**
4	11/2/2021	Tuesday	hotel	285166		Surveyor.sam@cms.hhs.gov
5	11/2/2021	Tuesday	285166	hotel		
6	11/3/2021	Wednesday	hotel	285279		
7	11/3/2021	Wednesday	285279	hotel		
8	11/4/2021	Thursday	hotel	435076		
9	11/4/2021	Thursday	435076	hotel		
10	11/5/2021	Friday	hotel	airport		
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Add your Email here

Address in the format: street, city, state abbreviation for any other location

Dates match with itinerary dates, and follow MM/DD/YYYY format

Fill Out the Excel Template

	STOP
	Complete the following checklist before submitting to assure the sheet has been filled out correctly
☑	Verify the field under the "From and To" columns contains the words "airport" or "hotel." CCN# (for LTC facilities), or full address (for Non-LTC or facilities w/o a CCN#)
☑	Add as many legs as you require. You can have more than one leg per day. One leg = One stop
☑	Enter 6-digit CCN# for LTC facilities; Enter full address for Non-LTC or facilities w/o CCN#
☑	Verify the physical address and format is correct (street) (city) (state abbreviation) e.g: 123 Cornelia St New York, NY
☑	Verify your full name is entered in the "Surveyor Name"
☑	Verify your full CMS email address is entered correctly in the "Surveyor Email

Proper Way of Filling the Excel Form; When Your Trip Does Not Require Flying

Sam Surveyor starts and ends at his home address

Add your name here

Leg	Date	Day	From	To		Surveyor Name
1	11/1/2021	Monday	7500 Security Blvd. Baltimore, MD	285166		Sam Surveyor
2	11/1/2021	Monday	285166	hotel		
3	11/1/2021	Monday	hotel	285166		**Surveyor Email**
4	11/2/2021	Tuesday	285166	hotel		Surveyor.sam@cms.hhs.gov
5	11/2/2021	Tuesday	hotel	285166		
6	11/3/2021	Wednesday	285166	hotel		
7	11/3/2021	Wednesday	hotel	435076		
8	11/4/2021	Thursday	435076	hotel		
9	11/4/2021	Thursday	hotel	435076		
10	11/5/2021	Friday	435076	7500 Security Blvd. Baltimore, MD		
11						

Add your CMS email here

Add the CCN ONLY for an LTC facility

Address in the format: street, city, state abbreviation for any other location

When Your Trip Does Not Require Flying

- There are three possibilities for a local trip:

  - Using a private car, beginning, and ending at the surveyor's residence

  - Ridesharing entails leaving the surveyor's residence and returning to the same location

  - Renting a car and returning it to the rental car location

- We recommend starting and ending local trips at your home address to get more accurate POV and ride share results

Submit your Travel Request

1. Fill out your template following the instructions in the Excel sheet. See "sample" tab. Save with filename YYYYMMDD First initial, Last name.
2. Save the pre-authorization itinerary as an Outlook attachment with filename YYYYMMDD First initial, Last name.
3. Upload your files to Box. **Verify both files have the same name.**
4. Notify us at Tantus at travelbotrequest@tantustech.com
5. Wait for your results. You will receive them within 4 hours from tantusbot@tantustech.com

Submit your Travel Request
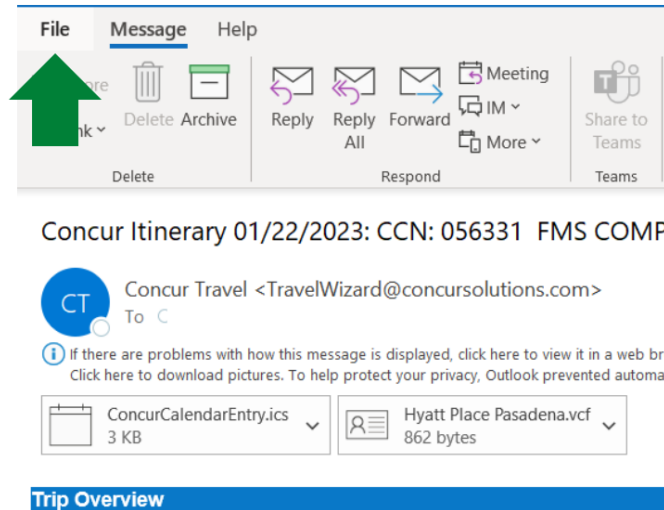
1 Open your pre-authorization email and click on "File"

2 Select "Save As"
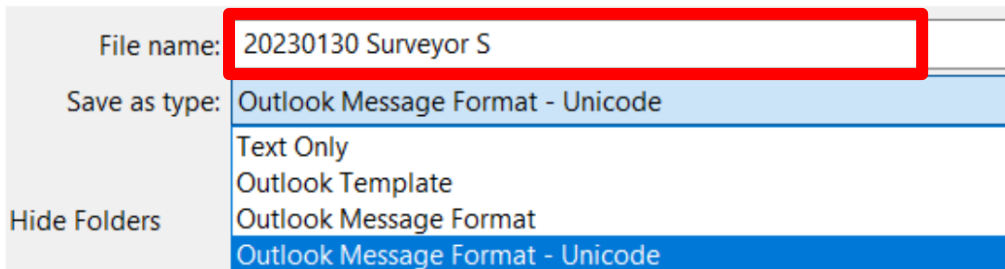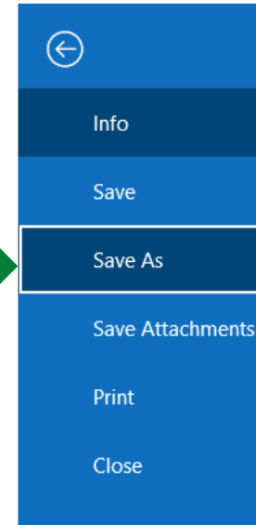
3 Save as Outlook Message Format- Unicode

File name: 20230130 Surveyor S

Save as type: Outlook Message Format - Unicode
- Text Only
- Outlook Template
- Outlook Message Format
- Outlook Message Format - Unicode

Hide Folders

Outlook and Excel file name must be the same for the bot to read them

20230130 Surveyor S.xlsx

20230130 Surveyor S.msg
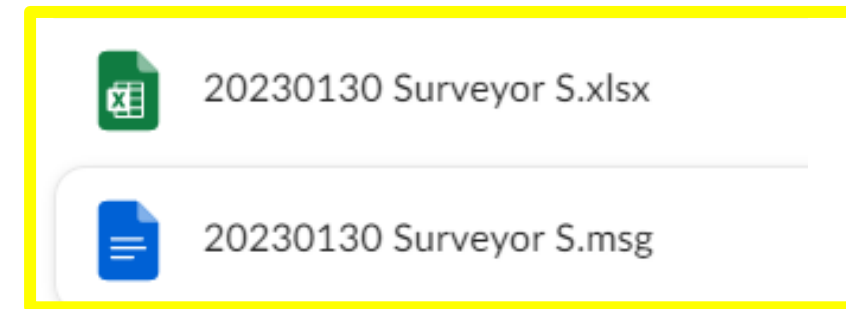
Upload your files to Box

Follow this path on Box to find the "TravelBotNewRequets" folder and upload your files there.
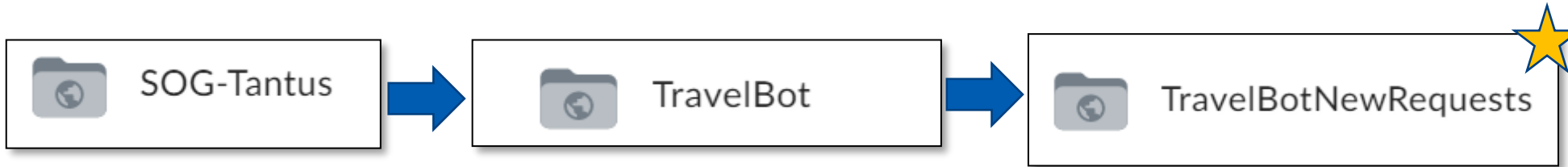
To upload, click on "New". "File Upload" and select your files

Knowledge Check- Find the Errors

Do not add the word Rental car or any other besides "Airport" and "Hotel."
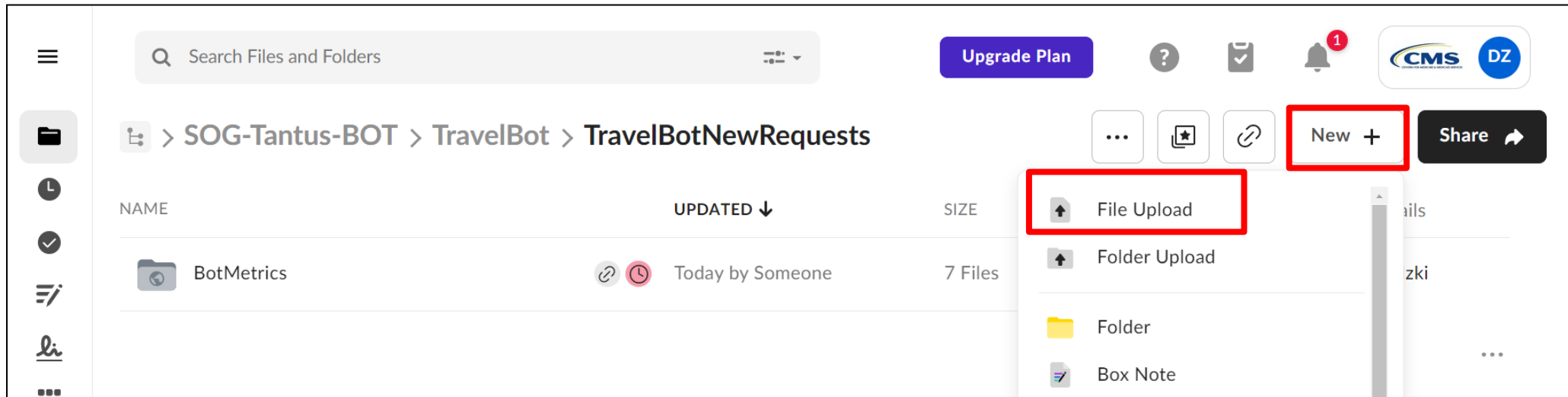
Do not add address in other format besides: "street, city, state abbreviation" for any other location

Date	Day	From	To		Surveyor Name
10/30/2022	Sunday	Medford airport	Rental car		
10/31/2022	Monday	Rental car	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526		
10/31/2022	Monday	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526	hotel		**Surveyor Email**
11/1/2022	Tuesday	hotel	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526		
11/1/2022	Tuesday	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526	hotel		
11/2/2022	Wednesday	hotel	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526		
11/2/2022	Wednesday	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526	hotel		
11/3/2022	Thursday	hotel	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526		
11/3/2022	Thursday	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526	hotel		
114/2022	114/2022	hotel	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526		
11/4/2022	Friday	CCN 123456, 759 NE 7th Street, Grants Pass, OR 97526	Medford airport		

Do not change the dates format. MM/DD/YYYY

Do not add word CCN+ number, only add a 6 digits number for CCN

Do not leave name and email boxes empty

Recap- Automated Process for Rental Car Justification
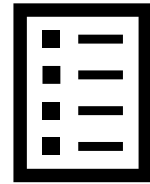
Request Pre-Authorization itinerary

Fill out Excel Template

Attached Pre-approved itinerary as an Outlook attachment, and Excel file on Box

Send email notifying TravelBotRequest

General Info

- Service Level Agreement: 4 hours (ET)

- The output of this automation is a file that replaces the RentalCarCostComparison. It should be used for informational purposes to assist with decision making rather than taken as direction on which mode of transportation must be taken.

Frequently Asked Questions

- **Does getting these results mean that my car rental is authorized?**

The travel bot results are only informational and should not be taken as authorization in any form. You should submit to Concur as you have submitted the files that you manually generated in the past. We are just providing you with support for your request, and you are responsible for making the final decision based on the results and the information you submit. We provide you with the Excel file in addition to the PDF, so you can edit it if needed.

- **For the itinerary, how are people attaching this is the authorization is not complete? Or can we add the rental car AFTER our authorization is already approved?**

  From the bot's perspective you should reserve the rental car when you do your preliminary (pre-authorization) itinerary. The bot will then calculate the lowest cost option. We are also adding the text to justify the rental even if not the most cost-effective. Once we send over the final comparisons, you can keep or cancel the rental based on the policy in your area (if it isn't most cost effective).

Frequently Asked Questions

- **Did you estimate the cost of taxi, uber, lyft on 2+ travelers with bags each? That would require us to order an extra-large vehicle.**

The bot does not currently have this functionality, but it is something on our backlog

According to CMS travel policy:

If you are traveling alone or with one other traveler, the default rental car size is compact or economy. If you are traveling with at least two additional travelers, you may reserve an intermediate size car. A justification should be included in the "Comments" section of ConcurGov indicating why a larger size car is necessary and including the names of the other travelers occupying the vehicle.

For this case CMS do not require staff to use the POV for business trips, however, if they choose to do so, and it is most economical, then they are allowed to use their own car. In this situation, CMS would not require the surveyor to take all of her coworkers in her/his POV.

Questions