



State Medical License Search Bot

Automation Anywhere Readme

For States: CA, NY, TX, VA, and GA

Version 1.0

16/12/2019

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1. Introduction

This document contains all essential information for the user to make full use of the State Medical License Search Bot or Digital Worker. Included are descriptions of the functions, capabilities, and step-by-step procedures for setup and configuration of the Bot.

Overview

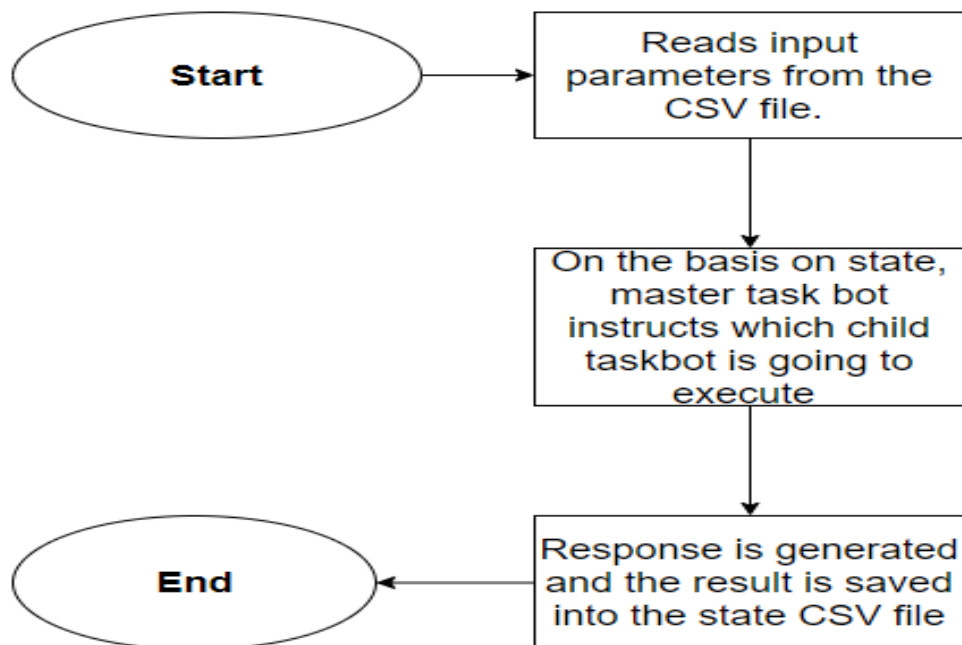
This Bot takes the license number, issuing state, and physician's first and last names from an input CSV file, fetches information about the physician from the respective state medical board, and saves the result to an output CSV file that is unique to each state.

Detailed steps are as follows:

MedicalLicenseSearch

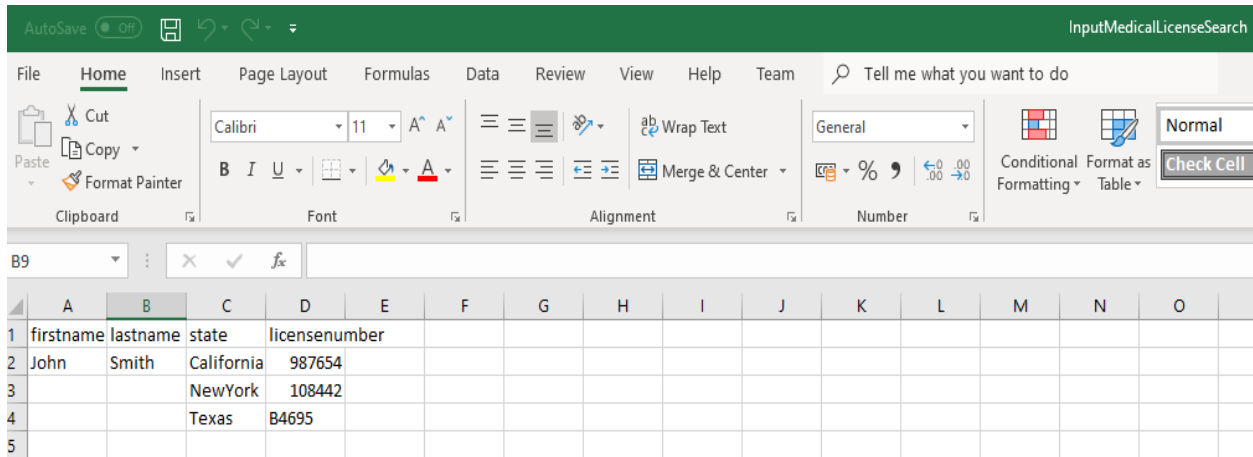
- 1) User provides the first name, last name, issuing state (from the list of states covered by this bot), and license number of the physician in the input CSV file, which contains both required and optional parameters.
 - Required Parameters in the input CSV file.
 - Optional Parameters in the input CSV file.
- 2) A master task bot runs a state-specific task bot and the result is saved to the state-specific CSV file.

1) Visual Flow –



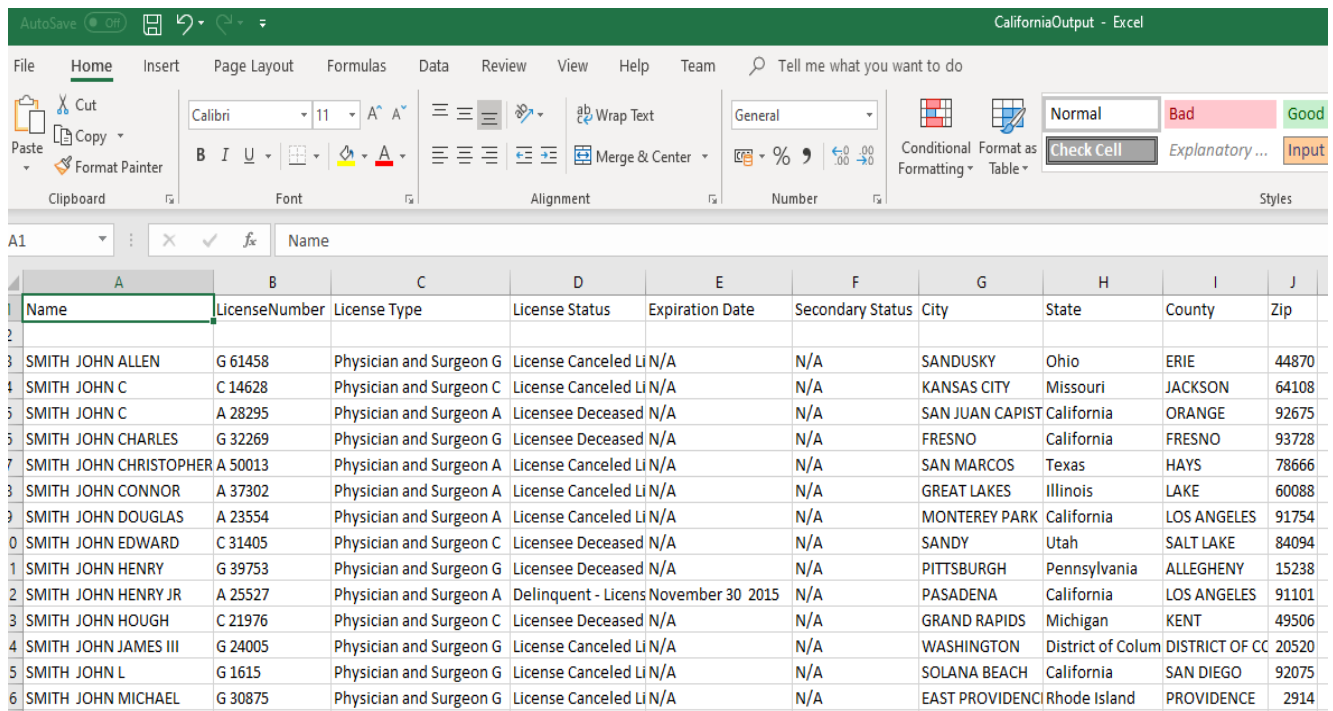
2) Input and Output Example –

Input: InputMedicalLicenseSearch.CSV



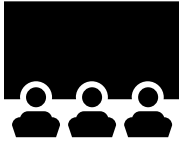
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	firstname	lastname	state	license number											
2	John	Smith	California	987654											
3			NewYork	108442											
4			Texas	B4695											
5															

Output: CaliforniaOutput.CSV



	A	B	C	D	E	F	G	H	I	J
1	Name	LicenseNumber	License Type	License Status	Expiration Date	Secondary Status	City	State	County	Zip
2										
3	SMITH JOHN ALLEN	G 61458	Physician and Surgeon G	License Canceled Li	N/A	N/A	SANDUSKY	Ohio	ERIE	44870
4	SMITH JOHN C	C 14628	Physician and Surgeon C	License Canceled Li	N/A	N/A	KANSAS CITY	Missouri	JACKSON	64108
5	SMITH JOHN C	A 28295	Physician and Surgeon A	Licensee Deceased	N/A	N/A	SAN JUAN CAPIST	California	ORANGE	92675
6	SMITH JOHN CHARLES	G 32269	Physician and Surgeon G	Licensee Deceased	N/A	N/A	FRESNO	California	FRESNO	93728
7	SMITH JOHN CHRISTOPHER	A 50013	Physician and Surgeon A	License Canceled Li	N/A	N/A	SAN MARCOS	Texas	HAYS	78666
8	SMITH JOHN CONNOR	A 37302	Physician and Surgeon A	License Canceled Li	N/A	N/A	GREAT LAKES	Illinois	LAKE	60088
9	SMITH JOHN DOUGLAS	A 23554	Physician and Surgeon A	License Canceled Li	N/A	N/A	MONTEREY PARK	California	LOS ANGELES	91754
10	SMITH JOHN EDWARD	C 31405	Physician and Surgeon C	Licensee Deceased	N/A	N/A	SANDY	Utah	SALT LAKE	84094
11	SMITH JOHN HENRY	G 39753	Physician and Surgeon G	Licensee Deceased	N/A	N/A	PITTSBURGH	Pennsylvania	ALLEGHENY	15238
12	SMITH JOHN HENRY JR	A 25527	Physician and Surgeon A	Delinquent - Licens	November 30 2015	N/A	PASADENA	California	LOS ANGELES	91101
13	SMITH JOHN HOUGH	C 21976	Physician and Surgeon C	Licensee Deceased	N/A	N/A	GRAND RAPIDS	Michigan	KENT	49506
14	SMITH JOHN JAMES III	G 24005	Physician and Surgeon G	License Canceled Li	N/A	N/A	WASHINGTON	District of Colum	DISTRICT OF CC	20520
15	SMITH JOHN L	G 1615	Physician and Surgeon G	License Canceled Li	N/A	N/A	SOLANA BEACH	California	SAN DIEGO	92075
16	SMITH JOHN MICHAEL	G 30875	Physician and Surgeon G	License Canceled Li	N/A	N/A	EAST PROVIDENC	Rhode Island	PROVIDENCE	2914

Common Use cases



The fields in the [CSV](#) can be changed to whatever data needs to be searched.

- Verify State Medical Licenses for following states:
 - **California**
 - **New York**
 - **Texas**
 - **Virginia**
 - **Georgia**

2. Requirements & Prerequisites

System Requirements



For the [PC](#) or server where the bot needs to run:

- ✓ [RAM](#): 8GB or higher
- ✓ Processor: Intel Core i5 or higher and equivalent for any other [OS](#)
- ✓ Hard Disk: Up to 2GB of overall free space in the [AA](#) Client installation drive

Reference below for [Enterprise Client & Control Room system requirements](#).

Prerequisites



- ✓ **Software needed -**
- ✓ [AA](#) Enterprise Client 11.x
- ✓ [AA](#) Enterprise Control Room 11.x

Security Measures

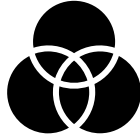


There are some security best-practice recommendations that you should follow with your bot.

- 3) Do not provide admin access to the Windows User Account executing the Bots, to avoid unintended data changes within the [CSV](#) Template.

3. Getting Started

Skill Matrix



The functionality of the Bot has been divided into a set of skills.

Below is an overview of how the task bots map to these skills:

Skill	Task Files	MetaBot Files
Search and Verify Medical Licensure details of physicians	Medical License Search.atmx California License Search.atmx Georgia License Search.atmx Texas License Search.atmx Virginia License Search.atmx New York License Search.atmx	NewYorkLicense.mbot

Installation Hierarchy



Once the bot is downloaded and installed, the installer creates the files in the folder structure as shown below.

Folder Structure on your Machine

Folder Structure	Description
<p><AA Application Path></p> <p>1. My Tasks</p> <p>1.1. Bot Store</p> <p>1.1.1. State Medical License Search-Automation Anywhere</p> <ul style="list-style-type: none"> ➤ Error Folder <ul style="list-style-type: none"> • Logs <ul style="list-style-type: none"> ○ Error logs Month-Day-Year Hour Min Sec.txt • Snapshots <ul style="list-style-type: none"> ○ Error Snap Month-Day-Year.png ➤ Input Folder <ul style="list-style-type: none"> • InputMedicalLicenseSearch.CSV ➤ Output Folder <ul style="list-style-type: none"> • CaliforniaOutput.CSV • GeorgiaOutput.CSV • NewYorkOutput.CSV • TexasOutput.CSV • VirginiaOutput.CSV ➤ My Tasks <ul style="list-style-type: none"> • Medical License Search.atmx • California License Search.atmx • New York License Search.atmx • Texas License Search.atmx • Virginia License Search.atmx • Georgia License Search.atmx 	<p><AA Application Path> is the location where AA files are stored on your machine</p> <p>1. My Tasks</p> <p>My Task Folder is the default directory where bot files are saved.</p> <p>1.1 Bot Store</p> <p>Bot Store Folder contains the Bot Name Folder which the installer creates during installation of the bot.</p> <p>1.1.1. State Medical License Search-Automation Anywhere</p> <p>This folder is created by the installer and contains files and folders needed for bot execution:</p> <ul style="list-style-type: none"> ➤ Error folder is where logs and snapshots of screens will be placed if something goes wrong during execution ➤ Input Folder is where the input files that the bot needs for execution of the use case are saved <ul style="list-style-type: none"> • InputMedicalLicenseSearch.CSV provides first name, last name, license number and state of physicians ➤ Output Folder is where the output files that the bot needs for execution of the use case are saved <ul style="list-style-type: none"> • CaliforniaOutput.CSV provides details of physicians licensed in California • NewYorkOutput.CSV provides details of physicians licensed in New York • TexasOutput.CSV provides details of physicians licensed in Texas • VirginiaOutput.CSV provides details of physicians licensed in Virginia • GeorgiaOutput.CSV provides details of physicians licensed in Georgia

2. My MetaBots <ul style="list-style-type: none"> ➤ NewYorkLicense.mbot 	<ul style="list-style-type: none"> ➤ My Tasks folder contains all the Developed Platform Source Code ➤ My MetaBots folder contains the Developed Metabots needed for bot execution.
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Quick Start

3.1.1 Setup



STEP 1 (Configuring Parameters with an External File)

External file can be configured at -

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere> Input Folder>InputMedicalLicenseSearch.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > CaliforniaOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > NewYorkOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > TexasOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > VirginiaOutput.CSV

AA Application Path > My Tasks > Bot Store > State Medical License Search-Automation Anywhere > Output Folder > GeorgiaOutput.CSV

Below is a table that summaries what each variable name is, what it does, and an example of the input:

Medical License Search

Variable Name	Type	Mandatory (Yes/No)	Purpose	Example Input
vFirstName	Text	No	First name of physician, taken from input CSV file	John
vLastName	Text	No	Last name of physician, taken from input CSV file	Smith
vState	Text	Yes	State issuing physician's license, taken from input CSV file Accepted values: California New York Texas Virginia Georgia	Texas
vLicenseNumber	Text	No (Required in case of New York)	License number of physician, taken from input CSV file	B11111

Note: Both license number and (first name and last name) are used to identify the physician. So in one row of the input CSV file, either or both must be present.

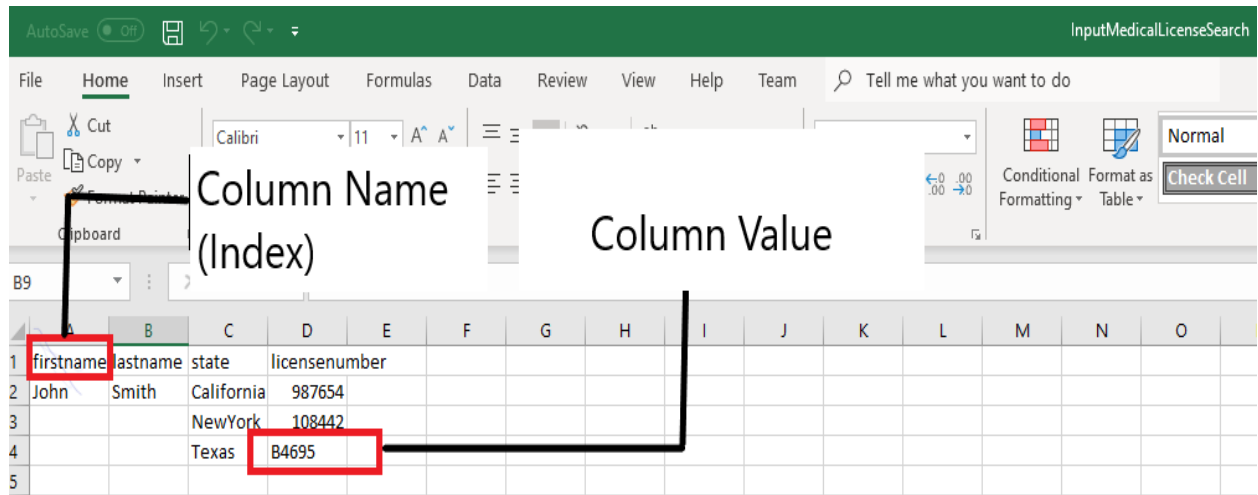
3.1.2 Guidance for configuring Filter conditions

a. Filter based on Column Value

Column Name is the header text that is present in the first row of the CSV file. Please do not delete or alter the Column Name.

Column Value is the value which needs to be matched against the Column Name. You can add or delete parameters as per your requirements.

Example



➤ Input CSV File-

InputMedicalLicenseSearch.CSV

- Required parameters:

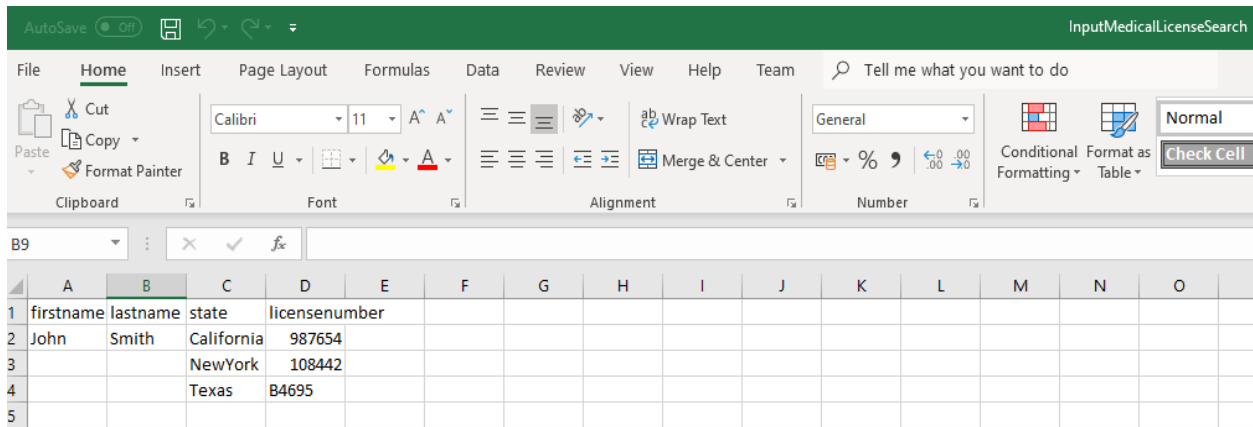
File Parameter Name	Type	Description	Example Input
state	Text	State issuing physician's license Accepted values: California, New York, Texas, Virginia, and Georgia	California

- **Optional Parameters -**

(If you don't want to add any value in the parameter leave it empty)

File Parameter Name	Type	Description	Example Input
firstname	Text	First name of physician	John
lastname	Text	Last name of physician	Smith
licensenumbr	Text (Required if state is New York)	License number of physician	B11111

Example:



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	firstname	lastname	state	licensenumbr											
2	John	Smith	California	987654											
3			NewYork	108442											
4			Texas	B4695											
5															

➤ **Output CSV Files-**

CaliforniaOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
License Number	Text	License number of physician	G 11111
License Type	Text	License type	Physician and Surgeon G
License Status	Text	Status of license	License Cancelled - License has been voluntarily cancelled or the license has been expired for at least five years and has not been renewed. No practice is permitted.
Expiration Date	Text	Expiration date of license	November 30 2015
Secondary Status	Text	Administrative action taken by other state or federal government	Probation Completed
City	Text	Home city of physician	PASADENA
State	Text	Home state of physician	California
County	Text	Home county of physician	LOS ANGELES
Zip	Text	Zip code of home city	91101

Example:

AutoSave On

CaliforniaOutput - Excel

File Home Insert Page Layout Formulas Data Review View Help Team Tell me what you want to do

Clipboard Font Alignment Number Styles

Normal Bad Good Neutral

Check Cell Explanatory ... Input Linked C

	A	B	C	D	E	F	G	H	I	J
1	Name	LicenseNumber	License Type	License Status	Expiration Date	Secondary Status	City	State	County	Zip
2										
3	SMITH JOHN ALLEN	G 61458	Physician and Surgeon G	License Canceled License	N/A	N/A	SANDUSKY	Ohio	ERIE	44870
4	SMITH JOHN C	C 14628	Physician and Surgeon C	License Canceled License	N/A	N/A	KANSAS CITY	Missouri	JACKSON	64108
5	SMITH JOHN C	A 28295	Physician and Surgeon A	Licensee Deceased Licens	N/A	N/A	SAN JUAN CAPISTRANO	California	ORANGE	92675
6	SMITH JOHN CHARLES	G 32269	Physician and Surgeon G	Licensee Deceased Licens	N/A	N/A	FRESNO	California	FRESNO	93728
7	SMITH JOHN CHRISTO	A 50013	Physician and Surgeon A	License Canceled License	N/A	N/A	SAN MARCOS	Texas	HAYS	78666
8	SMITH JOHN CONNOI	A 37302	Physician and Surgeon A	License Canceled License	N/A	N/A	GREAT LAKES	Illinois	LAKE	60088
9	SMITH JOHN DOUGLA	A 23554	Physician and Surgeon A	License Canceled License	N/A	N/A	MONTEREY PARK	California	LOS ANGE	91754
10	SMITH JOHN EDWAR	C 31405	Physician and Surgeon C	Licensee Deceased Licens	N/A	N/A	SANDY	Utah	SALT LAKE	84094
11	SMITH JOHN HENRY	G 39753	Physician and Surgeon G	Licensee Deceased Licens	N/A	N/A	PITTSBURGH	Pennsylvania	ALLEGHEN	15238
12	SMITH JOHN HENRY J	A 25527	Physician and Surgeon A	Delinquent - License rene	November 30 2015	N/A	PASADENA	California	LOS ANGE	91101
13	SMITH JOHN HOUGH	C 21976	Physician and Surgeon C	Licensee Deceased Licens	N/A	N/A	GRAND RAPIDS	Michigan	KENT	49506
14	SMITH JOHN JAMES II	G 24005	Physician and Surgeon G	License Canceled License	N/A	N/A	WASHINGTON	District of Co	DISTRICT C	20520
15	SMITH JOHN L	G 1615	Physician and Surgeon G	License Canceled License	N/A	N/A	SOLANA BEACH	California	SAN DIEGO	92075
16	SMITH JOHN MICHAEL	G 30875	Physician and Surgeon G	License Canceled License	N/A	N/A	EAST PROVIDENCE	Rhode Island	PROVIDEN	2914
17										

GeorgiaOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
License Type	Text	License type	Physician
Status	Text	Status of license	Active
License #	Text	License number	27916
Address	Text	Address of physician	LAGRANGE GA 30240

Example:

AutoSave Off Save Undo Redo GeorgiaOutput

File Home Insert Page Layout Formulas Data Review View Help Team Tell me what you want to do

Clipboard Font Alignment Number

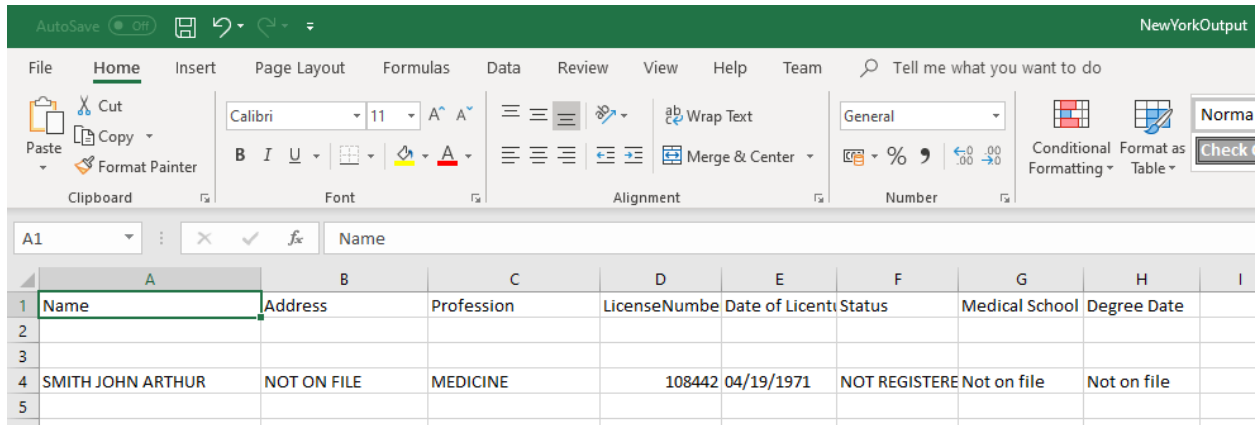
Calibri 11 A⁺ A⁻ B I U Wrap Text Merge & Center General Conditional Formatting Format as Table Check

	A	B	C	D	E	F	G
1							
2	Name	License Type	Status	License #	Address		
3	Smith John Connor	Physician	Active	27916	LAGRANGE GA 30240		
4	Smith John Darrell	Physician	Active	36012	RIVERDALE GA 30274		
5	Smith John Dixon	Physician Assistant	Active	6348	MACON GA 31210		
6	Smith John Dorsey	Physician	Active	14003	METTER GA 30439		
7	Smith John Edward	Physician	Lapsed	3934	FITZGERALD GA 31750		
8	Smith John Horatio II	Physician	Active	48940	Atlanta GA 30312		
9	Smith John Mell	Physician	Lapsed	2429			
10	Smith John Morton Jr.	Physician	Lapsed	14754	CASHIERS NC 28717		
11	Smith John O Jr.	Physician	Lapsed	7898	TALLAHASSEE FL 32309		
12	Smith John R	Physician	Lapsed	1838			
13	Smith John Raymond	Physician	Lapsed	3419	HAHIRA GA 31632		
14	Smith John Robert	Respiratory Care Professor	Lapsed	7388	SHARPSBURG GA 30277		
15	Smith John Taylor	Physician	Lapsed	29105	ATLANTA GA 30306		
16	Smith Johnathon	Physician	Active	80051	MONTGOMERY AL 36116		
17	1						

NewYorkOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
Address	Text	Address of physician	NEW YORK NY
Profession	Text	Profession of physician	Medicine
LicenseNumber	Text	License number	234567
Date of Licensure	Text	License issue date	02/08/2001
Status	Text	Status of license	LICENSE REVOKED
Medical School	Text	Medical school of physician	SUNY BUFFALO
Degree Date	Text	Degree completion date	06/01/1989

Example:

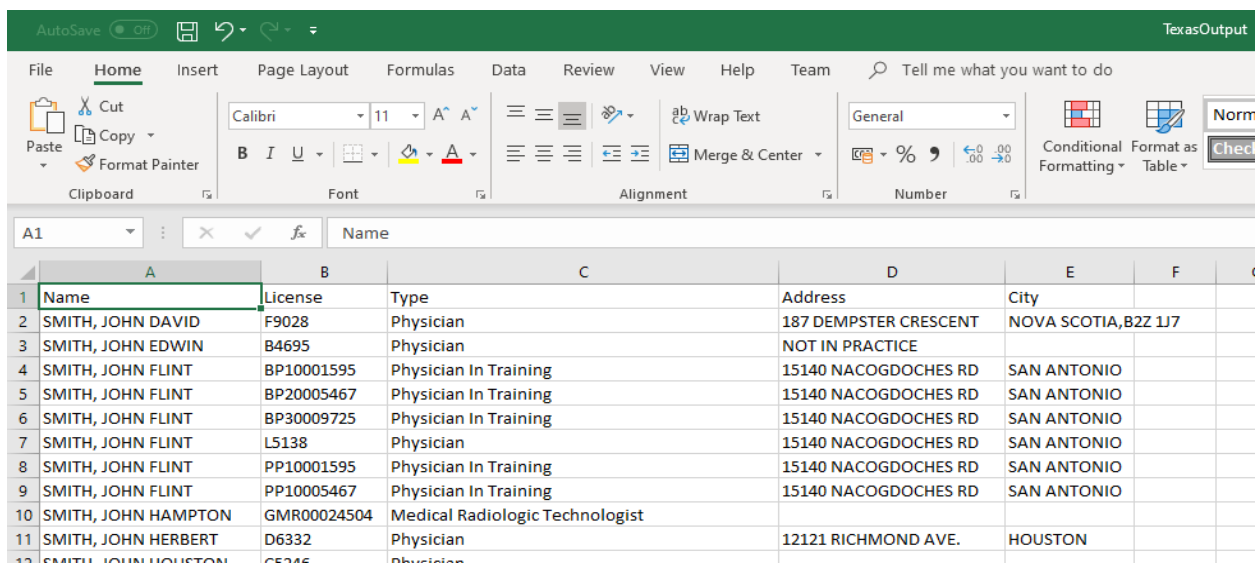


	A	B	C	D	E	F	G	H	I
1	Name	Address	Profession	License Number	Date of License	Status	Medical School	Degree Date	
2									
3									
4	SMITH JOHN ARTHUR	NOT ON FILE	MEDICINE	108442	04/19/1971	NOT REGISTERED	Not on file	Not on file	
5									

TexasOutput.CSV

File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
License	Text	License number of physician	F11111
Type	Text	Physician type	Physician
Address	Text	Address of physician	123 DEMPSTER CRESCENT
City	Text	Home city	SAN ANTONIO

Example:

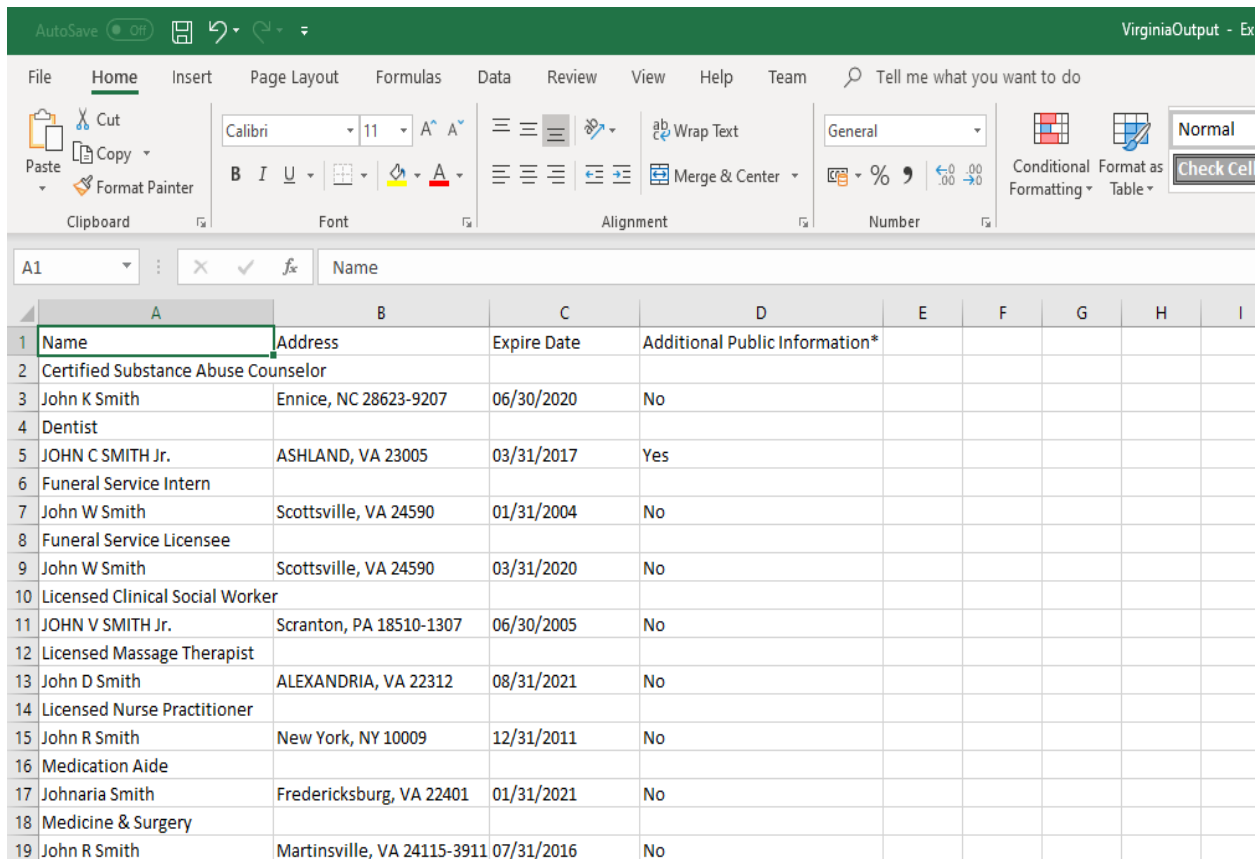


	A	B	C	D	E	F	G
1	Name	License	Type	Address	City		
2	SMITH, JOHN DAVID	F9028	Physician	187 DEMPSTER CRESCENT	NOVA SCOTIA, B2Z 1J7		
3	SMITH, JOHN EDWIN	B4695	Physician	NOT IN PRACTICE			
4	SMITH, JOHN FLINT	BP10001595	Physician In Training	15140 NACOGDOCHES RD	SAN ANTONIO		
5	SMITH, JOHN FLINT	BP20005467	Physician In Training	15140 NACOGDOCHES RD	SAN ANTONIO		
6	SMITH, JOHN FLINT	BP30009725	Physician In Training	15140 NACOGDOCHES RD	SAN ANTONIO		
7	SMITH, JOHN FLINT	L5138	Physician	15140 NACOGDOCHES RD	SAN ANTONIO		
8	SMITH, JOHN FLINT	PP10001595	Physician In Training	15140 NACOGDOCHES RD	SAN ANTONIO		
9	SMITH, JOHN FLINT	PP10005467	Physician In Training	15140 NACOGDOCHES RD	SAN ANTONIO		
10	SMITH, JOHN HAMPTON	GMR00024504	Medical Radiologic Technologist				
11	SMITH, JOHN HERBERT	D6332	Physician	12121 RICHMOND AVE.	HOUSTON		
12	SMITH, JOHN HOUSTON	63345	Physician				

VirginiaOutput.CSV

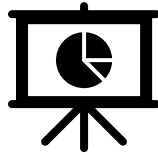
File Parameter Name	Type	Description	Example Output
Name	Text	Name of physician	Smith John C
Address	Text	Address of physician	123 DEMPSTER ROAD
Expire Date	Text	Expiry date of license	06/30/2020
Additional Public Information	Text	Additional information about physician	(None)

Example:



	A	B	C	D	E	F	G	H	I
1	Name	Address	Expire Date	Additional Public Information*					
2	Certified Substance Abuse Counselor								
3	John K Smith	Ennice, NC 28623-9207	06/30/2020	No					
4	Dentist								
5	JOHN C SMITH Jr.	ASHLAND, VA 23005	03/31/2017	Yes					
6	Funeral Service Intern								
7	John W Smith	Scottsville, VA 24590	01/31/2004	No					
8	Funeral Service Licensee								
9	John W Smith	Scottsville, VA 24590	03/31/2020	No					
10	Licensed Clinical Social Worker								
11	JOHN V SMITH Jr.	Scranton, PA 18510-1307	06/30/2005	No					
12	Licensed Massage Therapist								
13	John D Smith	ALEXANDRIA, VA 22312	08/31/2021	No					
14	Licensed Nurse Practitioner								
15	John R Smith	New York, NY 10009	12/31/2011	No					
16	Medication Aide								
17	Johnaria Smith	Fredericksburg, VA 22401	01/31/2021	No					
18	Medicine & Surgery								
19	John R Smith	Martinsville, VA 24115-3911	07/31/2016	No					

4. Reports



There are no Bot Insight Reports generated for this Bot.

5. Logs



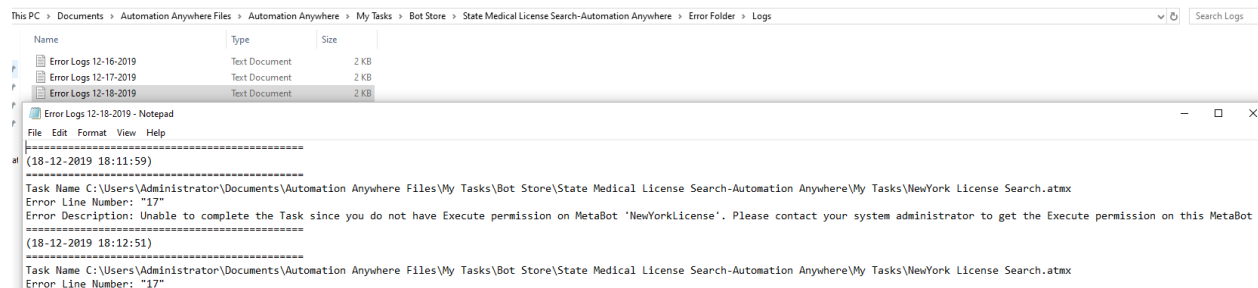
In case of Errors, Error Logs & Screenshots are generated within Error Folder (Highlighted below in yellow)

- My Tasks
 - Bot Store
 - Bot Name
 - Error Folder
 - Logs (Folder)
 - Error Logs Month-Day-Year Hour Min Sec.txt
 - Snapshots (Folder)
 - Error Snap Month-Day-Year.png

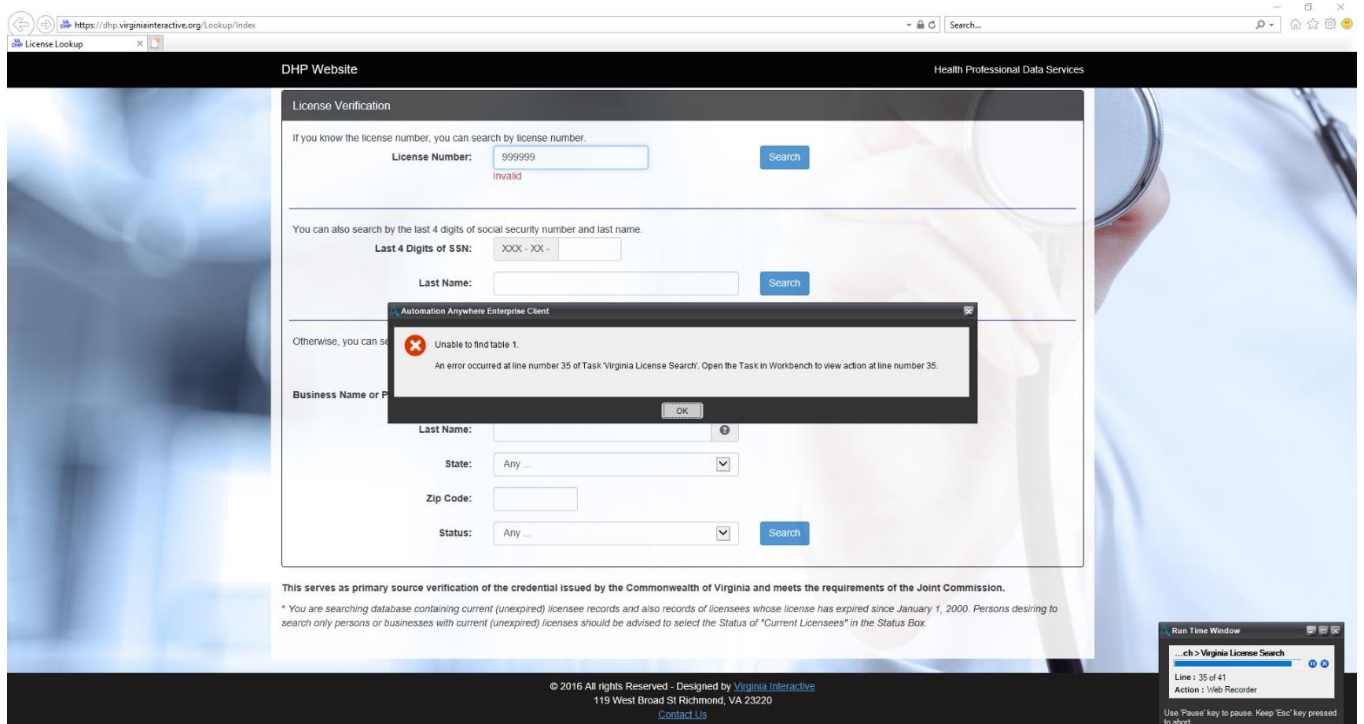
Error Logs will contain the below information -

- Generated Timestamp
- Task Name
- Error Line Number
- Error Description

Example:



Example



Note: There are no Custom Logs generated for this Bot.

6. Troubleshooting & Support



Support



Free bots are currently not supported directly.



Questions on Bot Functionality or Feature can also be posted to our Community site [Apeople](#)



Automation Anywhere provides a [Product Documentation portal](#) which can be accessed for more information about [AA](#)'s products and guidance on building bots and Digital Workers.

The "Build" section of the portal includes these sections:

- Getting Started - information on building bots recommended practices (including use of the Credential Vault)
- Build Advanced Bots - details on MetaBots and the approach to integrating code into them
- Build Digital Workers - high level architecture

FAQs



Q: The 'Create Locker' button is not visible in the Credential Vault Page. What do I do?

A: Please check if the role 'Locker Consumer' is assigned to the user and you are using an Enterprise Client version.

Appendix A: Record of Changes

No.	Version Number	Date of Change (DD/MM/YYYY)	Author	Notes
1	1.0	16/12/2019	Automation Anywhere	Version 1 Release

Appendix B: Acronyms

No.	Acronym	Description
1	AA	Automation Anywhere
2	CSV	Comma Separated File
3	DW	Digital Worker
4	CR	Credential Vault
5	CRM	Customer Relationship Management
6	API	Application Programming Interface
7	PC	Personal Computer
8	RAM	Random Access Memory
9	OS	Operating System

Appendix C: References

No.	Topic	Reference Link
1	System Requirements – Client	Click here
2	System Requirements – Control Room	Click here
3	How to create a Credential & Locker?	Click here
4	Credential Overview	Click here
5	A-People Community Site	Click here
6	Product Documentation Portal	Click here