

MEK Charge Reconciliation Handover SOP

Version 0.1.0 · 28 Oct 2026 · Problems: email Vasanth.s@ecareservices.com, CC murugeswaran.n@teamecare.com (section 5)

Downloads the Waystar claims and the Aquilaehr visits for every MEK location, both portals at the same time, matches them by patient name and date of service, and builds one Excel report per location plus one for All Locations.

1. How to run

1. Open <https://mek-charge-reconciliation.app.ecareindia.com/> in your browser.
2. Type the team password in **Password** and click **Sign in**. You stay signed in for 12 hours.
3. Click **Run reconciliation**.
4. Wait until the status next to the button says **Finished** or **Stopped**. Closing the tab doesn't stop the run.

Before you click Run reconciliation:

- **Download the reports you still need.** Every click first deletes all the previous reports, then downloads fresh data from both portals and builds new reports from it.
- Only one run at a time. If the button is greyed out and the status says "Running...", a run is already going: wait for it.

2. What you see while it runs

Where on the screen	What it shows
Waystar and Aquilaehr lanes	"Ready" → "Signing in..." → "3 of 10 locations" → "All 10 downloaded" (green). Orange "8 of 10 · 2 failed" when some locations failed. Red "Stopped" when that portal stopped
Excel reports box	"Waiting for both downloads" → "Building 4 of 11" → "11 reports ready" (green)
Status next to the button	"Running..." → "Finished <i>time</i> " (green) or "Stopped <i>time</i> " (red)
Activity list under the button	One line per step, starting with "Run started <i>time</i> ". Dot colours: green done, orange check this, red failed, grey progress
Technical log (click to open)	Raw lines, only for an email to us
Reports box	One row per report with "Updated <i>time</i> · <i>size</i> KB" and Download , plus Download all (ZIP)

The page refreshes itself every 2 seconds.

A normal run: both lanes sign in and fill up at the same time; when both say "All 10 downloaded", the Excel box counts to "11 reports ready" and the last line says "Finished. Your reports are ready to download below."

Step	The bot waits at most	Then
Sign in to each portal	3 min	That portal stops for this run (E01)
Each step for one location (find, switch, load, download)	15 s to 2 min	Skips that location. No step is retried

Step in only when: the status says Finished or Stopped, or no new line has appeared in the activity list for 10 minutes (E10).

3. Result

- **Good run:** "Finished", both lanes green "All 10 downloaded", "11 reports ready", no red or orange dots.

- **Needs a look:** any red or orange dot, an orange or red lane, or "Stopped". **"Finished" also shows when one portal failed to sign in: always check both lanes.**
- There is no email or alert. Open the page after every run.

Where: Reports box → **Download**, or **Download all (ZIP)**. Each Excel has a **Summary** sheet with the counts and a **Reconciliation** sheet. Filter its **Result** column:

Result	Meaning	What you do
Matched	Same date of service, first name and a last name	Nothing
Missing in Waystar	An Aquilaehr visit with no Waystar claim	Follow up. If the Note says "Claim ID ... is in Waystar with DOS ...", the claim exists with another date
Missing in Aquilaehr	A Waystar claim with no Aquilaehr visit	Follow up. If the Note says "Claim ID ... is in Aquilaehr with Visit Date ...", the visit exists with another date
Duplicate in Waystar	"Same patient + DOS already matched to another Waystar claim"	Check for a double claim

4. When something goes wrong

How it shows: a red or orange dot in the activity list, an orange or red lane, or the status "Stopped". The line names the location and the portal.

ID	Message you see	What it means	What you do
E01	"Couldn't sign in to <i>Portal</i> in time. Check the login details, then run again."	Nothing was downloaded from that portal. Its lane stays on "Signing in...", then turns red "Stopped"	Run again once. Fails again: email us (only we can change the logins)
E02	"Couldn't download <i>Location</i> from <i>Portal</i> . This location wasn't found in <i>Portal</i> ."	The location was renamed or removed in the portal	Email us. Re-running won't help
E03	"Couldn't download <i>Location</i> from <i>Portal</i> . <i>Portal</i> took too long to respond."	The portal was too slow	Download the good reports, run again later. Fails twice: email us
E04	"Couldn't download <i>Location</i> from Aquilaehr. Aquilaehr opened a different location than expected."	Aquilaehr showed the wrong practice	Run again. Fails twice: email us
E05	"Couldn't download <i>Location</i> from <i>Portal</i> . Try running again. If it keeps failing, open the technical log below."	Any other download problem	Run again. Fails twice: email us
E06	" <i>Portal</i> finished, but these locations couldn't be downloaded: <i>names</i> "	Summary of E02 to E05	Those locations have no report, or a one-sided one
E07	" <i>Location</i> has exactly the same <i>Portal</i> data as <i>Location</i> . Please check this location."	One may hold the other's data	Don't use those two reports. Run again (expected only when both have no data)
E08	"Skipped <i>Location</i> : nothing was downloaded from Aquilaehr"	No report was built for that location	Look for its red Aquilaehr line (E01 to E05)
E09	"Check <i>Location</i> : fewer than half of the visits matched. The wrong practice may have been downloaded."	Most visits didn't match	Before re-running, check its Note column. Dates exactly one day off the DOS: don't re-run, email us. Otherwise run again

E10	"Running..." with no new activity line for 10 minutes	The run is stuck	Email us. Don't start another run
E11	"Something unexpected went wrong. The technical log below has the details.", or "Stopped" with no red line that explains it	An error without a plain message, e.g. a new Waystar security question	Email us with the last 20 lines of Technical log
E12	A location has no report and no red line names it	A failed Waystar download is not always listed	Email us
E13	The lanes say "Ready" and the status is empty, although a run was started	The server restarted and the run was lost	Download what is listed, then run again
E14	"That password isn't right. Try again." or "Enter your password."	Wrong or empty password	Check for "Caps Lock is on" and type it again
E15	"Sign-in failed. Try again.", "Can't reach the server. Try again.", or a 404 / 502 page	The server or the network has a problem	Try again in 5 minutes, then email us

Don't:

- Click **Run reconciliation** before downloading the reports you need: it deletes them.
- Ask for a server restart or redeploy during a run: the run is lost.
- Sign in to Waystar or Aquilaehr with the bot's account during a run.

To stop it: there is no Stop button, and closing the page doesn't stop it. Let it finish, or email us and we stop it on the server.

5. Email us

Email **Vasanth.s@ecareservices.com** with **Murugeswaran** (murugeswaran.n@teamecare.com) in CC when section 4 says "email us", or when the same error comes back after one re-run. Answer: same working day.

To: Vasanth.s@ecareservices.com

CC: murugeswaran.n@teamecare.com

Subject: MEK Charge Reconciliation - E<number> - <date>

Run started: <first line of the activity list>

Error: E<number> - <the message, copied>

Location / portal:

What I did: <e.g. ran it again once>

Attached: screenshot of the Run box

Never send: the sign-in password, or the Excel reports (they hold patient names).