Major US healthcare system trusts Atos to transform Medicare workflows

Achieving Efficiency and Compliance: Enrollment Transformation for major integrated, not-for-profit health care delivery system

Atos

A major healthcare delivery organization streamlined Medicare quoting and enrollment with a centralized Salesforce application, enhancing efficiency, compliance, and broker and consumer experiences
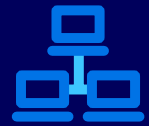
Outcomes :

Increased Efficiency	**Improved Broker and Consumer Experienc**	**Enhanced Visibility and Control**	**Seamless Integration and Data Management**

The Client

One of the largest health systems in the U.S. Mid-Atlantic and Southeast, and among the top 20 largest not-for-profit integrated health systems in the country.

Our client continued its path to harmonize the technology platforms by investing in several new applications and business process design. Salesforce was the selected vendor to be able to manage their Group quoting process and their member call center. There was also a realization that an overall IT Governance process was needed to manage the influx of business requests and the bandwidth of both internal and external resources. Atos's multi-year engagement with our client fostered a successful partnership, with multiple scrum teams collaborating to deliver strategic, project-specific and continuous enhancement work. This engagement has enabled our client to establish a world-class technology platform to effectively sell and support their product portfolio.

Our client faced several challenges that hindered their efficiency and user experience:

- Overburdened Salesforce Portfolio: The number of projects, maintenance tasks and IDEAs without a holistic prioritization and management paradigm led to inefficient delivery of the Salesforce portfolio.

- Quote to Enroll Workflow Limitations: The existing Quote to Enroll workflow for health plans was limited to a health plan and line of business leading to duplication of Quote to Enroll features in disparate systems.

- Inefficient Enrollment Processing: Manual processes for managing member enrollments and member inquiries led to delays and increased errors.

- Manual Workflows: Discrete processes like enrolling newborns, managing Dual Eligible Special Needs Plan (DSNP) indicators, and handling member preferences relied heavily on manual efforts.

- Inconsistent Task Routing: Manual task routing resulted in frequent misrouting and reassignments, slowing down response times.

- Limited Visibility and Tracking: Lack of robust inventory visibility and tracking to monitor work intake and distribute tasks among team members caused process inefficiencies and increased customer response times

- Reporting Constraints: Reporting capabilities were inadequate, making it challenging to extract timely insights and meet regulatory reporting needs.

- Lack of Real-Time Data: Teams struggled with outdated information, which delayed decision-making and reduced service quality.

- Data Silos: Data was spread across disparate systems complicating member and provider interactions.

- Auditing and Security: Audit trails, including the date of entry, effective change dates, and identity of change requestors needed improvement to ensure compliance and data accuracy.

The customer partnered with Atos to deliver innovative, scalable, customer-centric Salesforce solutions across eight projects: They followed a strong governance framework and a Salesforce Center of Excellence (CoE) roadmap to ensure long-term success and adaptability through all eight project streams.

Customer Experience Enhancements

- Patient Promise Workflow to ensure swift and accurate resolutions.

- Dynamic Routing for enrollment requests, enhancing prioritization.

- Public Enrollment Portals for self-service plan comparison and enrollment.

Technology used

- Salesforce Service Cloud: For case management, workflow automation and customer support.

- Salesforce Engagement Cloud (Customer): Implemented a publicly available portal that allows consumers to find information and enroll in Medicare plans autonomously.

- Salesforce Engagement Cloud (Partner): Added the Medicare line of business to the existing broker portal, providing the Medicare quote to enroll workflow, Medicare-specific navigation and list views driven by a brokers' readiness to sell Medicare.

Automation and Workflow Optimization

- Automated Contract Renewals and Large Group Quoting processes.

- Bulk Membership Import features for efficient updates.

- Broker Onboarding Workflows tailored to ensure compliance and streamline processes.

Data Integration and Centralization

- Integration of Provider and Member Databases for centralized data access.

- Real-time REST API Connections to external systems like QNXT and Jiva.

- Synchronization of tools like Magnum and Stepwise for accurate rate calculations.

Technology used

- Salesforce Knowledge: To house and maintain the migrated knowledge base from Oracle Service Cloud.

- Integration with existing systems

- Oracle Service Cloud: Migrated knowledge base and reporting functionality to ensure continuity in data and insights.

- QNXT: Our client's application that stores its members eligibility and claims information.

- Enterprise Provider Database: Real-time integration allowed for current provider data within Salesforce.

Enhanced Reporting and Insights

- Advanced Dashboards and Role-Based Reporting for compliance and decision-making.

- Tailored insights into lead activity, application statuses and operational efficiency.

- Integration with existing systems: Salesforce Reports and Dashboards: for real-time analytics and compliance reporting.

Customer and Broker Empowerment

- Self-Service Portals for brokers to manage onboarding and agreements.

- Enhanced Medicare Quoting Dashboards with role-based functionality.

Integration with existing systems:

- Salesforce Vlocity (formerly Industries) for enhanced proposal management, flexible product selection and customizable templates.

- National Insurance Producer Registry (NIPR): The Salesforce Onboarding application was integrated with NIPR to pull back licensing status, regulatory actions and lines of authority into the Salesforce broker record.

- DocuSign: The Salesforce Onboarding application was integrated with DocuSign to both store and capture signatures on tax documents and broker agreements.

- Appinium: The Salesforce Onboarding application was integrated with Appinium to provide product and regulatory training to new and existing brokers, recording the training date and disposition on the broker record.

- Attentis Medicare Advantage Shop & Enroll AmpliFire: Utilized a 3rd party Salesforce accelerator from Attentis to provide a comprehensive Medicare shopping tool for brokers, internal agents and consumers.

- Attentis Broker Onboarding AmpliFire: Automating onboarding workflows and tracking certifications for brokers, agencies, and sales agents and provided brokers and agencies with an autonomous onboarding process to request appointment, provide tax documents, sign broker agreements and obtain product training.

Brand and System Scalability

- Comprehensive **Rebranding Initiatives** to align systems with our client's identity.

- Modular solutions supporting **Acquisitions and Expansions** with repeatable processes.

Compliance and Security

- Fairness Algorithms ensure ethical referrals and equitable treatment.

- Transparent Auditing and Regulatory Compliance Tracking workflows.

- Secure management of sensitive data using Salesforce best practices.

Ongoing Support and Scalability

- Continuous Production Support to address incidents and enhance systems.

- Scalable solutions to support growth across geographies and acquisitions.

Integration with existing systems, uncategorized:

The project integrated Salesforce with the customer's existing systems, including:

- **iCertis CLM** for comprehensive contract lifecycle management within the Large Group health plan quotes.

- **Customer Comment Intake Page:** Direct data flow into Salesforce for efficient handling of customer comments and complaints.

The customer achieved operational excellence in its scalable, future-ready Salesforce ecosystem.

This Salesforce implementation led to significant improvements in overall Salesforce IT Governance, management of Group Sales Operations and member interactions. Highlights of the outcomes include:

- Enhanced Efficiency: Automation of workflows, task management and processes; reduced administrative effort, streamlined operations; and enabled faster responses across patient support, sales, broker onboarding, and enrollment systems.

- Improved User and Member Experiences: Personalized portals, intuitive dashboards, and quicker response times elevated satisfaction for patients, members, brokers, and internal teams.

- Streamlined Compliance: Achieved full adherence to state and industry-specific regulations, including HIPAA standards, reducing compliance risks and enhancing data security.

- Improved Data Integrity and Accuracy: Real-time integrations, automated data synchronization, and error reduction ensured reliable and secure data handling.

- Actionable Insights: Advanced reporting and dashboards empowered leadership with data-driven decisions, improving strategic planning and operational monitoring.

- Scalable Growth Framework: Flexible, future-proof infrastructure supported acquisitions, market expansion, and increased operational demands seamlessly.

- Cross-Functional Collaboration: Integration of tools like Salesforce, iCertis, and Vlocity fostered teamwork and reduced bottlenecks across sales, legal, and operations.

- Operational Readiness: Standardized templates, automated processes, and scalable platforms positioned our client for industry leadership and market competitiveness.

- Reduced Processing Times: Automation and task prioritization decreased enrollment, claim, and onboarding times, enabling faster service delivery.

- Enhanced Knowledge Management: Centralized and real-time knowledge bases improved access to information, ensuring accuracy and empowering teams with up-to-date resources.

- Lower IT Overhead: Integrated systems and automated workflows reduced IT support needs, allowing resources to focus on strategic initiatives.

- Future-Ready Architecture: API integrations and scalable technologies prepared our client for ongoing innovation and adaptability to market changes.

- Improved Security and Privacy: Data segmentation and access controls minimized risks of breaches, ensuring high trust and zero reported incidents post-implementation.

- Faster Time to Market: Streamlined quoting, renewal, and enrollment processes enabled quicker deployment of health plans and new services.

These outcomes collectively positioned The customer as a leader in operational efficiency, compliance and customer satisfaction. Now the healthcare organization is poised for sustainable growth in the competitive US healthcare industry.

Why Atos?

Atos's partnership with the client has established a modern, scalable call center and quoting and web enrollment solution that aligns with our client's current needs and prepares them for future growth. The Atos team demonstrated exceptional adaptability, pivoting seamlessly to accommodate evolving requirements and collaborating effectively with cross-functional teams to deliver practical, impactful solutions.

From automation and scalability to enhanced user experience, Atos's contributions have redefined the client's operations, creating immediate and lasting value. Through a commitment to excellence, teamwork, and continuous improvement, Atos has built a solid foundation for our client's ongoing success in an increasingly competitive market.

Atos & Salesforce, Better Together

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The purpose of Atos is to help design the future of the information space. Its expertise and services support the development of knowledge, education and research in a multicultural approach and contribute to the development of scientific and technological excellence. Across the world, the Group enables its customers and employees, and members of societies at large to live, work and develop sustainably, in a safe and secure information space.

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Let's start a discussion together

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