

UM Organization Reaps Full Benefits of New System Implementation

This growing non-profit Utilization Management Services Organization needed improved systems in order to increase overall productivity and improve client service. Outlook Associates assisted with the detailed documentation of requirements and with the review and selection of systems to support this client's complex needs. Once the systems were selected, we helped with implementation planning and oversight, including working with the selected vendor on critical system modifications and software release testing. We developed policies and procedures for ongoing quality assurance monitoring, to ensure that new releases of the software would continue to function properly in the client's environment. In the process of completing this engagement, we provided mentorship to IS staff, so that they could continue to manage and support the systems effectively.

After the new systems were in place, the client hired Outlook Associates to evaluate their centralized provider database. This mission-critical database was found to contain significant errors and inconsistencies, which were impacting the quality of information available from the new systems. We then worked with staff to develop data cleansing routines and interface improvements, to enable timely, accurate and consistent reporting.

Outlook Associates delivers cost effective solutions

...solutions that work in the real world!

Services

- ❑ Systems assessment and diagnosis
- ❑ Requirements documentation
- ❑ Vendor selection
- ❑ Policy and procedure development
- ❑ System implementation planning
- ❑ Database assessment

Results

- ❑ System evaluation, selection and implementation based on sound, expert advice
- ❑ Successful negotiation of vendor contract
- ❑ Optimization of a mission-critical function through improved systems, interfaces and database design
- ❑ Increased loyalty among client's customers as a result of improved services

Situation

This client provides utilization and case management services to a wide range of healthcare organizations. Their services include referral management and clinical decision support. As their client base grew, they needed more sophisticated systems to accommodate data from a growing number of sources and to their customers' reporting needs. This client lacked the expertise to define their requirements and to facilitate the system selection process. They also needed assistance with the vendor review process, with vendor negotiations and with management and oversight of the vendor relationship. They made the decision to select a product that was new to the market but which offered the functionality they needed. This created the need for vigilant oversight and testing throughout the implementation.

Their existing system was weak in its data editing capacity and was unable to ensure the quality of data coming from disparate systems, which created additional challenges during conversion to the new system. The provider database was a source of particular concern as the conversion of data from the old to the new system was problematic and continued to impact on the quality of data. All of these conditions converged to create a need for additional outside, expert help.

Solution

Outlook Associates guided this client through the definition and prioritization of requirements for their new UM/case management system. After the initial list of system requirements was finalized, we assisted with the development and distribution of a formal RFP, followed by evaluation and scoring of vendor responses. We facilitated vendor product demonstrations, including providing structured scenarios that each vendor had to address. We also assisted with the vendor contract negotiation process.

Once a selection was made and the system installed, we were asked to serve as a bridge between the vendor and the client. We provided guidance in development of policies and procedures to provide on-going monitoring and tracking of software corrections, software enhancement requests and in software release testing. Standardizing these processes created an interlocking structure that could also be used for monitoring of vendor contractual performance and for performing correction and regression testing for all subsequent releases. These procedures helped ensure that existing functionality was not lost as requested corrections and enhancements were made.