

Customer Case Study

Application

- ✓ Internal IT Help Desk
- ✓ Eligibility Verification
- ✓ Member Services Call Center
- ✓ System Error Reporting
- ✓ Report Request Tracking

Business Need

Centralize help desk activities and increase level one problem resolution for employee issues and requests

Solution

FootPrints – 100% web-based help desk and support automation software

How does HealthMed Services, a Managed Service Organization (MSO) with 100 employees and 32,000 customers, centrally track and manage all of its service requests?

HealthMed uses **UniPress® Software's FootPrints®** to automate internal and external service operations, as well as a range of other request-driven projects.



The Challenge

Based in Whittier, California, HealthMed Services is the managed service organization for two independent physicians' associations, including Presbyterian Health Physicians and Presbyterian Inter-Community Hospital. As a managed service organization, HealthMed provides all non-clinical "back-office" management services, including billing, marketing, purchasing, and health plan contracting administration to more than 32,000 healthcare customers.

Prior to selecting a web-based service desk, HealthMed outsourced its IT help desk operations. In 1999, Vince Rinner, Chief Information Officer at HealthMed, led a team to bring this strategic operation in-house in an effort to improve efficiencies and service levels. Rinner saw that service requests were falling through the cracks and he did not have an effective system to track (or assess) how long it took to resolve such issues. He relied on a Microsoft® Excel spreadsheet and IBM® Lotus Notes® as his tracking tools.

Rinner's first step towards bringing the help desk operations in-house was to query HealthMed's IT group to understand the types of inbound service requests and processes they needed to track, manage, and control. He then surveyed employees who responded by requesting a system that would resolve their issues faster than the current outsourced process. Rinner searched for a flexible, web-based service desk solution that could effectively track and manage HealthMed's help desk operations.

The Approach

In early 2000, HealthMed evaluated 10 different help desk solutions, including Intuit®'s Track-It!®, IBM Lotus Notes®, and Magic Service Desk™ from Network Associates® Magic Solutions®. Rinner knew that the solution he would ultimately select needed to be web-based and include a central knowledge base to capture information on common issues. It also needed the capability to enable users to easily submit tickets from the field – either via email or the Internet. In February 2000, after an extensive review, HealthMed selected FootPrints citing its web-based functionality, advanced features, easy-to-use interface, and extreme flexibility.

The FootPrints Solution @ HealthMed Services

HealthMed deployed FootPrints on a Microsoft® Internet Information Services (IIS) web server and used the web-based system's built-in database. Rinner was very impressed with FootPrints' ease of deployment, as it took an hour to configure his internal help desk. "The system's web interface made it extremely easy-to-use. Within a week, we completely customized FootPrints to match our processes, and I was able to get my help desk team trained and ready for action."

Rinner's first project was HealthMed's internal help desk. Key features of FootPrints that are vital to HealthMed include knowledge management, two-way email management, escalation, reporting, business process tracking, and centralized workflow automation.

"With 100 employees at HealthMed and an additional 2,000 at Presbyterian Inter-Community Hospital, we receive many technical inquiries each day, all related to computer support," explains Rinner. "Having a centralized repository to track, manage, and control service issues and requests was critical to our business."

HealthMed's internal help desk is staffed by a group of 7 agents. Prior to FootPrints, all service requests were received by phone. Now 90 percent of the inquiries received are submitted via email or the web, speeding the overall support process.

Within the system, Rinner and his team created a searchable knowledge base that includes more than 40 solutions to common problems and other frequently asked questions. Using FootPrints' self-service online functionality, HealthMed employees can easily find answers to common questions before creating a ticket. This eliminates the need to speak with an agent. For example, if an employee is having trouble with an email password, he or she can search the knowledge base for a viable solution. If a user cannot find an answer in the knowledge base, he or she can easily create their own ticket which will be routed to an available agent. FootPrints will then automatically send an email notification acknowledging the employees request, along with a tracking number for future reference. Rinner also configured the system so that issues unresolved by an agent within two weeks are automatically sent to him. This ensures that nothing falls through the cracks.

In addition to the internal help desk, HealthMed expanded its use of FootPrints to track healthcare eligibility verifications which are received from independent physician organizations. The company has one full-time agent using FootPrints to manage these requests. Formerly, a paper-based process was used. FootPrints enabled HealthMed to automate such requests and reduce the time required to resolve specific issues. For example, when HealthMed's claims department determines that a member might be ineligible for coverage, a member services representative can now easily submit a request to the company's eligibility department to confirm membership details. As a result, eligibility verifications require hours to resolve, versus days if not weeks using the old paper-based process. The group averages 200 requests per day and over the past two years closed more than 20,000 eligibility related tickets. HealthMed saved a significant amount of money on claims that might have been paid to ineligible members.

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– Vince Rinner, Chief Information Officer

Key Features for HealthMed Services

- Centrally managed customer request tracking
- Knowledge management
- Self-service online
- Two-way email management
- Easy customization for different projects
- Escalation and business rules support
- Workflow automation
- Automated support activity reporting

"FootPrints give us the flexibility to create projects that support a broad range of business activities," says Rinner. "We can continuously design, customize, and change the interface without programming. This allows us to capture specific information necessary to support our business processes."

The use of FootPrints continues to grow at HealthMed as they extend the system to manage and track other request-oriented projects throughout the organization, including:

Member Services Call Center – Three call center operators field approximately 3,400 calls per month from more than 32,000 members that call for healthcare provider referrals, authorization requests, claims inquiries, and general complaint-type inquiries. FootPrints helps the member services call center track requests and provide quick responses.

System Error Reporting – When a healthcare provider or physician within HealthMed's network needs to change a contract, a formal request must be submitted in writing. This paper-based process is now automated using FootPrints. All change requests are now entered into the system which automatically generates a ticket. These tickets are then automatically assigned and handled by the appropriate personnel. FootPrints increases the speed of processing changes, prevents data entry errors, and improves the overall quality of membership claims.

Report Request Tracking – HealthMed's support group receives report generation requests from departments throughout the organization. Offering a range of reporting capabilities, FootPrints has helped HealthMed develop customized activity and performance reports for each of its departments. Prior to FootPrints, a hand-written form was needed to request reports from the eligibility verification group or member services call center. Rinner and his team now have the capability to track all requests, how long it takes to complete them, contract terms within reports, and other types of requests.

The Results

HealthMed significantly improved its internal help desk operations and expanded the system to streamline a range of other request-oriented processes that were previously managed with paper-based forms or spreadsheets.

With FootPrints, HealthMed employees are much more self-sufficient in solving problems on their own. The searchable solutions knowledge base enables employees and the help desk agents to resolve issues much faster. As a result, 95% of HealthMed's calls are now solved on the first attempt. This is enabling Rinner and his team to keep pace with increased workloads.

Rinner's team also increased its productivity. Because problems are addressed and resolved at a much faster rate, HealthMed is now able to re-allocate its IT resources to focus on other projects and business needs. "We started off with a few FootPrints licenses and kept growing exponentially, adding more users

Results

- 90% of phone requests are now submitted through the web or email
- 95% of calls are now solved at level one
- Stopped issues from falling through the cracks
- Ensures responsive service to 32,000 customers
- Streamlined claims eligibility process and saved \$400,000 in benefit payments
- Proactively manage 200 issues a day related to eligibility verification; over 20,000 logged in two years
- Improved workflow and productivity
- Improved reporting, enabling management and agents to understand trends and needs
- Reduced staff and reallocated resources to support other business needs

The Results (cont'd)

and projects since management realized the tangible ROI of the system and how it is instrumental in keeping things running smoothly."

With FootPrints, HealthMed has realized significant cost savings, especially when calculating the number of claims that are no longer erroneously paid because they were now deemed ineligible via the FootPrints tracking system. "We have saved over \$400,000 by cleaning up our systems eligibility," explained Rinner. FootPrints has also helped Rinner and his team achieve significant time efficiencies to resolve requests, including the number of times that claims are touched, time to enter a claim, and time to respond. This has helped HealthMed optimize its help desk resources and improve overall workflow and productivity.

While Rinner's primary reason for purchasing FootPrints was to manage HealthMed's internal help desk operations, the system has evolved to drive a range of business-critical initiatives, easily surpassing his expectations.

Overall, Rinner has been highly satisfied with its web-based service desk solution and the support from UniPress. "I have been a software developer for 15 years and I have never seen a better product than FootPrints."

About UniPress Software, Inc.

Headquartered in Edison, New Jersey, UniPress Software, Inc. is a developer of web-based service desk automation software serving mid-market companies, departments within large enterprise organizations, and small businesses. The company's FootPrints® product line, launched in 1996, provides a comprehensive range of capabilities to significantly improve help desk and customer support operations, including centrally managed, multi-channel customer issue tracking, self-service online, knowledge management, professionally written solutions knowledge bases, two-way email management, live eSupport, dynamic access to existing Microsoft Exchange and other LDAP-based corporate address books, and automated IT asset management. The FootPrints product line is widely used by more than 1,700 corporate organizations, government offices, and educational institutions worldwide, including Prudential Financial, BHP Petroleum, IBM, Kampgrounds of America, Schwab Capital Markets L.P., the IRS, and the University of Pennsylvania. UniPress has been developing and marketing software for 21 years, serving more than 22,000 customers since its inception in 1983.

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