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Migrating from The Source to KnowledgeXchange

12.05.23

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Summary To Date

Authors

There are 4 trained authors (Wave 1), who have created articles as part of the KX Author licensing process. There is currently no structured process to migrate content. The documents they worked on were selected based on:

- + Not being up for annual review until Q3/Q4 2024
- + Low traffic (<100 clicks in the previous 6-9 months)
- + Ease of conversion (help the authors learn the tool without having to re-imagine the content)

All Wave 1 authors successfully completed their mentor licensure in Jan 2024.

| Wave 1 | Wave 2 |
|---------------------|----------------|
| Angela Taylor | Bill Kane |
| Betty Stasko-Miller | Brian Mertz |
| Natasha DeRosier | Heather Vela |
| Nicholas Lachimia | Katie Coomes |
| | Jeri Reuter |
| | Jessica Greggs |
| | Megan Williams |
| | Sarah Hyde |

Author/Mentor Alignment

| January Mentor Candidates | February Author Candidates |
|---------------------------|-------------------------------|
| Nick Lachimia | Jeri Reuter
Megan Williams |
| Betty Stasko-Miller | Bill Kane
Katie Coomes |
| Angela Taylor | Brian Mertz
Jessica Greggs |
| Natasha DeRosier | Heather Vela
Sarah Hyde |

| Wave 3 | Wave 4 | Wave 5 |
|-------------|-------------|-------------|
| 3/13 - 3/14 | 4/10 - 4/11 | 5/22 - 5/23 |
| | | |

KnowledgeXchange

The Enterprise Knowledge Management (EKM) team has a process to crawl The Source for Flare (non-binary) and non-converted (binary) documents:

1. With the OpsInsight team's indexer, all Accredo L&D content is crawled every 4 hours.
2. Site map created in Coveo based off the indexer's work.
3. KnowledgeXchange uses the site map to allow for proper use and display of metatags (filters) and puts documents in the correct Knowledge Domains.

There are some challenges with macro-based binary documents (.XLSM) and PDFs saved with older versions of Adobe Acrobat. A fix is being worked on which may include adding them as files attached to articles in KX. Ultimately, any macro-based binary document can continue to be hosted in The Source if absolutely needed and KX is unable to support it as a file attachment.

Content Migration Status

The EKM team has provided a Content Migration Strategy for an overall flow, but no formalized process has been created (part of the reason this document is being created). To date, roughly 75 documents have been converted from SOPs, Job Aids, etc. into KX articles. Several of these are internal L&D documents and newly created content (like the Intro to WalkMe Onscreen Guide). Again, (nearly) all of them are part of the KX Author licensure process.

Document Counts

Data as of 01/05/2024

Note: Includes Flare documents tagged “Expired” per Dominic

| Project | Doc. Count* |
|----------------|-------------|
| TRC | 751 |
| CSC | 45 |
| ESSDS | 472 |
| Client Pages | 232 |
| Fertility | 297 |
| Frontend | 619 |
| Fulfillment | 267 |
| PAC | 609 |
| Source Content | 189 |
| Transformation | 111 |
| What’s New | 55 |
| Total | 3,647 |

I Don’t Want to Read a Book About This

Fair enough, here’s a quick summary of the document:

- Migrate non-binary content by copying, pasting, and adjusting formatting. Almost all documents will fit within the Salesforce editor’s character limit (about 131,000 characters). The new editor allows for things like collapsible headers to make the documents more like current Flare material. Larger documents would need to be chunked out.
 - Documents will be retired in the eyes of the end user, but the content will be hidden if someone follows the link (with a landing page that will direct them to the KX article, or KX search).
- Migrate binary content by creating a new article and uploading it as an attachment in the “Files” section. The author will need to search the document and extract searchable terms to put into the field as KX does not index these.
- Create/Update internal processes around the style guide, migrating different document types, and versioning/compliance.
- Determine how content will migrate (waves, time commitments, what to do with requests for new content during this time, etc.)

- Accomplish this using as much existing documentation as possible from others who have done similar migrations – there's lots of content in the SO Operating Enablement Knowledge Domain that talks about migrating from Flare to KX from when ESI did it.

Content Pre-Migration Work

Challenges/Risks

- + Longer SOPs and Job Aids may require unique information mapping approaches in order to fit within the boundaries of KnowledgeXchange and Knowledge Centered Service (KCS) methodologies.
 - KCS dictates that article titles should be phrased as a question, since this is what the user is “really” searching for.
 - KCS recommends smaller chunks of information, leaving articles considerably more focused on one particular part of a process instead of a larger, linear process flow.
- + Compliance/auditing dictate the information is up to date, easy to access, and **easy to understand**
- + Challenges from our business partners about structural changes to the documentation they use daily.
- + Impact to training content, as references and links will need to be updated.
- + Salesforce is a system based on relationships and objects, so each “version” of a document is issued a new Object ID (read: URL) every time a new version is published.
- + Flare is currently a more robust option for creating content, allowing more style and formatting options.
- + Long migration timeline of 4,000+ documents needing to be converted to **at least** one KX article. We will have a better understanding of this as we begin converting on a larger scale and measure LOE.
- + Business partners currently do not want to author their own content, but this could change.
- + Potential impacts to SME draft approval (article validation), Annual Review, and Specialty Change Control. May not be a risk as we can continue to use these.
- + Business partners are unfamiliar with the article validation process.

Commented [BK1]: Better way to say this?

Needs, Gaps, and Mitigating Strategies

If there is existing documentation in the SO Operating Enablement Knowledge Domain, we may be able to use it and adopt it completely; situations may require creating entirely new articles. Authors have access to edit/clone/create documents in the Knowledge Domain

The [Enterprise Operations Knowledge Management Homepage](#) outlines “all” articles needed by ESI KX authors to manage content.

Intake, Update, and Retirement Processes

Flagging

- + No current Accredo flagging strategy.
 - Betty is monitoring a reported created to monitor flags across all Knowledge Domains, but this will need to scale to include all licensed authors.
 - Flag Reports can be created and filtered by Knowledge Domains

- ESI side of the business has struggled with the workload of dealing with flags while balancing their regular tasks.
- + Can continue to use the Specialty Request Center for intake and updates.
 - Other parts of the enterprise continue to use their own intake process.
- + Time tracking specifics need to be worked out. The ESI side of the business creates one request for the year and adds subtasks for each flag worked.
- + Retirement process is known as archiving in KX.

Relevant KnowledgeXchange articles:

- + [What flag lists should I monitor daily as an ESI Domain Author?](#)
- + [Creating ESI Flag Lists as an ESI Domain Author](#)
- + [How to do I track my time when working flags as an ESI Domain Author?](#)
- + [What to consider before archiving an article](#)
- + [Archiving a Rule Based Knowledge Article that Required Approval](#)
- + [Why was an article archived?](#)

NEWT

In order to track migration work, new data should be added to these dropdowns/fields on the request form:

- + Request Type: L&D Only (currently exists)
 - Request Sub-Type
 - KX Migration – Binary Content
 - KX Migration – Client Page
 - KX Migration – Job Aid
 - KX Migration – Other Content
 - KX Migration – SOP / WI

After a request is submitted, the following deliverable types should be added:

- + KX Migration – Information Mapping/KCS Methodology
- + KX Migration – Article Formatting/Cleanup
- + KX Migration – Draft Validation
- + KX Migration – Change Control
- + KX Migration – Flare Retirement

Additionally, a “Flare to KX Migration” checkbox could be added (similar to the Transformation task checkbox) so authors can designate incoming requests for new content as opportunities to migrate.

Style & Format

Authors are expected to follow the Enterprise style guide while going through licensure. Our Style Guide for Structured Writing would need to be revamped before migration.

Relevant KnowledgeXchange articles:

- + [KnowledgeXchange Article Style Guide](#)
- + [What are the functions of the text editor in KnowledgeXchange?](#)
- + [What are the ESI Domain Style Guide Exceptions?](#)
- + [What are the standards for formatting and font styles in KnowledgeXchange?](#)
- + [What are the hyperlink standards for an article in KnowledgeXchange?](#)
- + [What is a Smart Link and why should I use it?](#)
- + [What is the standard for formatting numbers in KnowledgeXchange?](#)
- + [What are the attachment standards for an article in KnowledgeXchange?](#)
- + [What is the standard for date formatting in KnowledgeXchange?](#)
- + [What is the standard for using hyphens in KnowledgeXchange?](#)
- + [What is the standard for customer data in a KnowledgeXchange article?](#)
- + [How do Operating Enablement authors format font in KnowledgeXchange articles?](#)

Recommendation: Restructure our style guide to adapt the Enterprise Style Guide, except where necessary.

Information Mapping – Titles

With KCS there is some allowance for articles titles that start with an action verb in them, so they're included here as possibilities:

| Title | Knowledge Domain |
|---|-------------------------------|
| Teacher Retirement Systems of Texas (TRS - ActiveCare) Commercial Retail Fill Restriction Program (Smart90) | ESI Accounts Customer Service |
| New Process for Tiering Cases | ESI Coverage Review |
| Alluma - Authorizations | ESI Accounts Customer Service |
| Work the Deceased Patient Tracking Queue | ESI Customer Service |
| How to Split a Claim in US Government Facets | Cigna Medicare |

Recommendation: Use the existing title, define an internal process around chunking SOPs at or near the character limit (next section). Authors can create questions based on anything they think references the article. (this may be a little too freeform for them, need to define a process where they would pull relevant content out of the larger SOP and into a related reference article. Then again, part of KCS/KX Author training is knowing when to chunk/what to chunk)

Information Mapping – Overall Chunking & Readability

This will have to be on a document-by-document basis, but a process will need to be defined as mentioned above that will cover chunking information out into multiple articles while minimizing impact to readability.

- + [What is the word or character limit of a knowledge article?](#)

Character Count Testing

| Title | Character Count |
|---|-----------------|
| Rare Disease Call Model - Update Order Scheduling and Precall Tasks, SOP 95-030 | 20,452 |
| Work an Intake Task, SOP 1-1 | 25,993 |
| Text and Email Messaging Services, SOP 10-508 | 62,686 |
| Order Scheduling for Mail (Integrated) Shipments, SOP 10-410 | 72,277 |
| Verify Retail (Direct) Referral Benefits, SOP 100-441 | 82,394 |
| Oncology Consult Calls, SOP 26-211 | 127,675 |
| RPH Verification in CareCentral, SOP 8-3 | 175,483 |

Note: Word includes hyperlinks (URL+Text) in character counts. This number is also likely higher than the true character count that would appear in KX since this is the entire article, owners/authoring notes included, which are separate from the “answer” field.

These documents were found by asking Tech Writers to think of the longest documents they knew of.

OpsInsight or Dominic may be able to provide a report of the character counter for the **text output** of Flare documents, which would help for assignment of work and prioritization.

Information Mapping – Glossary

Glossary items that are unique to Accredo (or not already created) will need to be created as articles.

- + [How do I create a knowledge article to define a word, acronym, or phrase?](#)
- + [When to link a word, acronym, or phrase to its definition in KnowledgeXchange?](#)

Information Mapping – Approvals / Authoring Notes / What’s New

See [KX Fields to Support Compliance / Versioning](#)

Information Mapping – SOPs / Job Aids

Recommendation: Copy and paste text-output versions of Flare documents into the Salesforce editor. Adjust formatting as needed.

If the SOP doesn't fit into the "answer" field, consider ways it can be chunked into multiple articles while maintaining the integrity of the main article. For example, are there callouts for other lines of business that could be in their own SOPs?

Consider the end user's need to follow the process in a linear fashion, and don't chunk just for the sake of supporting the KCS methodologies.

Information Mapping – Client Pages

Client pages being formatted differently than anything else poses a unique challenge. We (should be) able to create an index of all client pages like we currently have, and they should require little modification. Nick has converted some internal documentation to KX regarding client pages (linked below).

Article about migrating ESI Client Pages from Flare to KnowledgeXchange

- + [How to Create an ESI Client Page in KnowledgeXchange](#)

Client pages across other Knowledge Domains

- + [TriWest/ VA PC3 - Commercial Client Page](#)
- + [Amazon Commercial Client Page](#)
- + [Verizon Commercial Client Page](#)
- + [Middletown Works Client Page](#)
- + [Kohler - Commercial Client Page](#)
- + [ExxonMobil Commercial Client Page](#)
- + [ConnectiCare, Inc. Commercial Client Page](#)
- + [Columbia Public Schools Commercial Client Page](#)
- + [Medicare Part D - Clear Spring Health Client Page](#)
- + [Medicare Part D - Centene Client Page](#)
- + [Medicare Part D - Priority Health Client Page](#)

Articles created (converted) by Nick, but still reference Flare:

- + [How do I create an Accredo client page?](#)
- + [How do I publish an Accredo client page?](#)

Information Mapping – Drug Overviews

These may be the “easiest” (big air quotes) to convert as they share the most similarities across multiple drugs.

Information Mapping – Special Tools (DSG, PRG, etc.)

Can continue to be hosted on the Source as there is no way for KX to effectively support them in their current format.

Information Mapping – Binary Content

Binary content can be uploaded directly to a new article, but the content inside is **not** searchable in KX. Part of the conversion process will include going through the document for likely searchable information, such as:

- + Drug Names / Manufacturers
- + Equipment Names / Manufacturers
- + Specific acronyms or variations of the acronym (example: FACalculator.xlsm would need to also have "Financial Assistance Plan Calculator" in the body of the article.

Article title can be some variation of "How do I access the..." if it's a tool, or whatever fits for PDFs/Forms.

Article Validation (SME Review) / Specialty Change Control / Annual Review

- + KX has an article validation process that is more focused on draft approval than final approval from the business, but there are ways to customize the approvers where SMEs could approve first, then it could theoretically move on to the change control process. There are some limitations:
 - One person cancelling it cancels the entire process.
 - Limited reporting/tracking
 - If someone needs updates, a new version of the document is created, and the author must cancel the old approval process and start a new one due to how articles are created in Salesforce.
- + SCC process works and other L&D teams use their own internal change control systems.
- + Bobbi Turkovich's team on the ESI side (allegedly) has a more robust change control SharePoint. Scheduled to review it with her January 2024 as she is OOO Nov/Dec
 - Bobbi's group does have a slightly more robust tool that somewhat combines our Annual Review and SCC processes, but there would be some heavy lifting involved to combine and automate them vs. continuing to use SCC/AR as is and then migrating to KX when their tools support it.

Annual Review

- + Tool is scheduled to be available for testing in Q1 2024.
- + Bobbi's group combines AR + SCC in their own SharePoint, called the Master Document List (MDL). They don't require everyone's approval, they require a majority + priority (i.e. some approvers are absolutely required, like DPPs)

Recommendation for SCC/AR: Continue to use the tools we have until KX supports them fully and content is mostly migrated. Draft Validation can be completed in KX.

Relevant Articles:

- + [How to create an approval request](#)
- + [Approval Requests in KnowledgeXchange](#)
- + [How do I request approval on a knowledge flag?](#)

Compliance

Considerations

- + What are the auditors looking for?
- + What buy-in do we need to obtain from DPPs/Sr. Leadership to make large-scale changes?
 - When to include them in conversion discussions?
- + How to track migration from Flare to KX

KX Fields to Support Compliance / Versioning

- + **Information Origin** field
 - When document migrates from Flare to KX, information origin field should be populated with:
 - Name of original system (Flare)
 - Document Type
 - Document Number (if applicable)
 - Example: Flare SOP 1-1, Work an Intake Task
 - This field does **not** update from version to version, so future versions would include:
 - Flag Name / Number
 - Or
 - SRC Request Number
- + **Version Comments** and **Version Details** fields
 - This field does **not** update from version to version.
 - Can be used to replace the Authoring Notes, etc. sections in The Source

Reporting

TBD

Level of Effort (LOE) Time Study

Using the Wave 1 (and possibly Wave 2) authors, have them each convert:

- + “Copy and Paste” of Flare output.
 - 1 “Short” SOP
 - 1 “Long” SOP
 - 1 Job Aid
 - 1 Drug Overview
- + Application of all KCS/KX methodologies/styles
 - 1 “Short” SOP
 - 1 “Long” SOP
 - 1 Job Aid
 - 1 Drug Overview

Articles would stay in a draft status if validation/annual review processes aren’t finalized.

LOE measurement should include:

- + Chunking / Mapping
 - Time invested in creating supporting articles to that fit KCS methodology.
 - These should be tracked individually within the overall documents LOE measurement.
- + Potential distinctive differences
 - Image-centric documents
 - Unique/unusual code made to fit the business’s needs.
 - Content was already in need of an update (i.e., breaking out into new SOPs, etc.)
 - Anything the authors felt slowed them down (system speed, KX authoring tool, etc.)
- + Validation/Approval time
 - Questions/concerns from approvers,
 - Creation to validation time.
 - Validation to publish (or draft completion) time.

NEWT

NEWT can support this time study as-is, as long as the task/sub-tasks are named appropriately. For future migration work, changes will need to be implemented to better track LOE and migration details.

LOE Formula

$$\frac{(\text{hours of LOE needed per document} * \text{number of documents in wave}) + 15\% \text{ buffer}}{(\text{hours available per author per week} * \text{number of authors available to work})}$$

Candidates for Conversion (list to expand)

| Title | Business Area | Type | Character Count |
|--|----------------|---------------|-----------------|
| Abbreviations and Acronyms Quick Reference Guide, Job Aid | All AHG | Job Aid | 39,083 |
| Visco-3 Drug Program Overview, Job Aid | Contact Center | Drug Overview | 3,217 |
| Epclusa Drug Overview, Job Aid | Contact Center | Drug Overview | 3,652 |
| Ocrevus Drug Overview, SOP 10-547 | Contact Center | Drug Overview | 4,776 |
| Access 360 Escalations, Job Aid | Contact Center | Job Aid | 6,447 |
| Tracking Shipments, Job Aid | Contact Center | Job Aid | 12,678 |
| Cancel a PTC Scheduled Shipment, SOP 10-525 | Contact Center | SOP | 3,208 |
| Process Letters Received for Patient Language Preference, SOP 10-613 | Contact Center | SOP | 3,496 |
| How to Handle Reverse and Rebill Requests, SOP 10-540 | Contact Center | SOP | 6,838 |
| Petition a Quality Audit, SOP 10-680 | Contact Center | SOP | 7,015 |
| Rare TRC Complaint, SOP 95-116 | Contact Center | SOP | 8,329 |
| Duopa Reorder Process, SOP 43-07 | Contact Center | SOP | 9,354 |
| Order Status Calls, SOP 10-708 | Contact Center | SOP | 40,796 |
| Locate a Client Page, Job Aid | CSC | Job Aid | 11,680 |
| Days Supply Guide, SOP 85-233 | Freedom | SOP | 4,672 |
| Balance Maintenance, SOP 85-100 | Freedom | SOP | 6,300 |
| Plegridy Intramuscular, Job Aid | Front End | Job Aid | 4,431 |
| Role of Rare Disease Operation Lead and Program Managers, Job Aid | Front End | Job Aid | 9,502 |
| Rare Disease Arkansas New Patient Counseling, SOP 95-111 | Front End | SOP | 4,685 |
| Cellcept and Mycophenolate Suspension, Job Aid | Fulfillment | Job Aid | 3,238 |
| ScriptView, Job Aid | Fulfillment | Job Aid | 5,505 |
| Barcode Labeling, SOP 11-024 | Fulfillment | SOP | 3,805 |
| Pest Control Maintenance, SOP 03-005 | Fulfillment | SOP | 4,412 |
| Safe Handling and Storage of Dry Ice, SOP 11-059 | Fulfillment | SOP | 6,102 |
| Operate the SAS Super 100/180 Microbial Air Sampler, SOP 47-22 | Fulfillment | SOP | 8,072 |
| Bridge Supply for AstraZeneca Oncology Team, SOP 26-147 | Fulfillment | SOP | 9,710 |
| Receive and Dispense Lyfgenia – Fulfillment, SOP 12-168 | Fulfillment | SOP | 10,679 |
| Vabysmo Drug Overview, SOP 100-1018 | PAC | Drug Overview | 3,475 |
| Gleevec Drug Overview, SOP 100-721 | PAC | Drug Overview | 4,509 |
| Lemtrada Drug Overview, SOP 100-669 | PAC | Drug Overview | 6,961 |
| Gilotrif Drug Overview, SOP 100-476 | PAC | Drug Overview | 10,078 |
| Fulfillment Hold Status, Job Aid | PAC | Job Aid | 2,373 |
| Medicare 569 Rejection, SOP 100-183 | PAC | SOP | 3,515 |
| Xolair Copay Card, SOP 100-315 | PAC | SOP | 6,958 |
| At Risk Alerts, SOP 100-992 | PAC | SOP | 12,407 |
| OnePA - Write Access, SOP 100-1003 | PAC | SOP | 19,725 |

| | | | |
|--|----------------|---------------|--------|
| Arestin Clearance, SOP 100-634 | PAC | SOP | 23,148 |
| Carbaglu Drug Overview, SOP 95-005 | PAC/FE | Drug Overview | 20,781 |
| Introduction to CareCentral, Job Aid | Transformation | Job Aid | 4,016 |
| Specific Manufacturer Requests in Rph Verification, SOP 8-23 | Transformation | SOP | 7,453 |

Quick Links

Demoed on 01/11/24. UX is different, but the functionality is largely the same. Domain Owners or the KX Support Team can add Quick Links.

Documentation will need to be written for users to grasp the UX difference.

| Quick Links | | | |
|---|---------------------------------|-------------------------------|---|
| Title | Category | Domain | Description |
| | All, ESI Document | All, AAPS Prepay Postpay Solu | |
| Eligibility Verification, SOP 2.10 | ESI Document Links | Express Scripts Pharmacy | This is the description for Eligibility Verification, SOP 2.10 |
| Handle a Pull Call Request, SOP 45.4.4 | ESI Document Links | Express Scripts Pharmacy | This is the description for Handle a Pull Call Request, SOP 45.4.4 |
| Send Correct Feedback to Internal Departments, SOP 45.3.3.1 | ESI Document Links | Express Scripts Pharmacy | This is the description for Send Correct Feedback to Internal Departments, SOP 45.3.3.1 |
| Oncology Contact Information and Resources (OCIR) | Oncology Specific | ESI PBM Support Services | This is the description for the Oncology Contact Information and Resources (OCIR) link |
| Oncology Macros | Oncology Specific | Express Scripts Pharmacy | This is information about the Oncology Macros tool |
| Oncology Quick Reference Cards (QRC) | Oncology Specific | Express Scripts Pharmacy | This is information about the Oncology Quick Reference Cards (QRC) tool |
| ESI Practice Standards | Partner Policies and Procedures | ESI Direct Claims | This is information about ESI Practice Standards |
| Close | | | |

Potential Internal Process Documentation

- + Migrating content from Flare to KX (clone of existing doc from SO Operating Enablement)
 - Specific focus on how we use the Information Origin field, the "Migrated" metatag, the Flare snippet/splash page
- + Quick Links (how to add, edit, etc.)
- + Headline News (how to add, edit, etc.)
- + Managing Annual Review (since it will still be handled in the Source)

- + Thoughts/ideas/best practices around when to “copy and paste” vs. when to fully apply KCS methodology during the migration process
 - Could be looped in to the “Migrating Flare content to KX” article if needed

Content Migration

Focus / Goals

- + Prioritize high use content.
- + Prioritize content with potential issues (i.e., documents that are for All Accredo Audiences as filtering is a challenge)
- + Phase 1: Stop using two systems (Flare + KX Authoring Tool) aka get all content in KX as fast/effectively possible with minimal modifications.
- + Phase 2 (after Flare retirement): Apply KCS methodologies.

Recommendation Summary

1. Migrate all binary content first.
2. Stop using two systems as quickly as possible by directly copying, pasting, and formatting Flare content directly into KnowledgeXchange with minimal (if any) modification to titles. The newest version of the Salesforce editor allows for collapsible headers, this will help provide aesthetic similarity to The Source.

Migrating from Flare to KnowledgeXchange

Archiving/Landing Pages for migrated content

Existing documentation covers this, we may need to make slight modifications to it.

- + [Migrate Flare Content to KnowledgeXchange](#)

It appears the ESI line of business quite literally copy and pasted the information into the Rich Text Editor and modified it from there. If we did the same thing, we could get everything in and apply KCS methodologies later.

Dealing with “cascading links”

Situation: Update SOP 1-1, but the links to other SOPs are still in Flare (or have landing pages). How do we keep these links up to date? Need to check with Bobbi to see

Is there a way to generate a link tree that shows the most linked/least linked documents and how deep the link rabbit hole goes?

Idea: Convert 1 link deep – the links referenced in the original document being migrated, do not migrate the documents linked in the second document. How will we know to go back?

Migrating Binary Documents to KnowledgeXchange

Migrating binary documents could work as a first wave of migration, as it would reduce the reliance on OpsInsight/EKM scripting with indexers/site maps/etc. However, since binary content is not searchable, a process would need to be created (see the [Information Mapping – Binary Content](#) section)

Potential Timeline

+ Q1 2024

- Wave 1 Mentor Training
- Wave 2 Author Training
- Time study
- Managers buy-in
- Annual Review demo
- NEWT Updates
- Establish committees.

+ Q2

- Wave 2 Authors licensed.
- Wave 0 – Test Migration
 - Binary documents
 - Ensure “searchable terms” are included within each article to maintain search usefulness.
 - Selected SOPs from each line of business (TBD based on potential ease of conversion)
 - All internal L&D documentation (moved into SO Operating Enablement)
 - Part of licensure process for Authors + Mentors
 - Wave 1 authors can do “copy and paste” method.
 - Wave 2 authors can follow full KCS methodologies (required to get licensed)
 - Gauge feedback from the business
- Style Guide adaptation and release
- Compliance/DPP/etc. buy-in (if needed)
- Determine future waves of migration.
 - Get buy-in from managers on potential time commitments for authors.
- Determine future author/mentor waves.

+ Q3

- Wave 1 Migration (to be completed before EOY)

+ Q4

- Potential freeze due to operations prep for 1/1
- Opportunity for “lessons learned” with KX Authors + business.

+ **Q1 2025 →**

- Continued Migration from Flare.
- Continued additions/improvements to KX based on Source functionality.
- Continued author/mentor training and licensure.

Potential Committees

- + Intake, Flagging, and Draft Validation
 - Are there changes needed to the Intake process/form?
 - Who should track flag intake? Managers, Authors, everyone? For all domains?
 - How to track time for Flagging (Managers & Authors both)
 - Do the draft validation features in KX fit our need?
 - What articles should be created to support the choices we make? Can we leverage any existing documentation in SO Operating Enablement?
- + Style Guide & Information Mapping
 - What's "required" from our Style Guide?
 - What's the best way to implement the Enterprise style guide while still maintaining what's "required" for Accredo documentation.
 - What articles should be created to support the choices we make? Can we leverage any existing documentation in SO Operating Enablement?
- + Annual Review
 - Is SCC (or another SharePoint) the superior product over what is in KX?
 - What articles should be created to support the choices we make? Can we leverage any existing documentation in SO Operating Enablement?
- + Document Prioritization / Waves
 - Usage?
 - Business Area?
 - SOP Series / Document Type?
 - Binary documents first?
- + Internal Documentation Creation
 - What documents from other committees need to be written?
 - General migration documentation (i.e., articles for the business-specific rules behind topics like the information origin field, versioning, migrating content, etc.)

EVERNORTH . .

Accredo
By **EVERNORTH**

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