

# Case Study

## Maintenance and Renewal Activities Web App for Employer Groups

SgMART

Clerical

Subscriber Maintenance

Group Maintenance

UW

Search

Output & Reporting

Administration

Received RequestsPend ResponsesMy WorkSupervisor ViewGroups Management

Work Location

CLERK

SM

GM

Underwriting

QualityReview

Supervisor

1 - 0 - 0

0 - 0 - 0 - 0

0 - 0 - 0

0 - 0 - 0 - 0

0 - 0 - 0

0 - 0 - 0

View File - 0001

REROUTE FILE

REASSIGN FILE

REQUEST FOR REASSIGNMENT

REQUEST FOR ACTION

NOTIFICATION HISTORY

PEND FILE

COMPLETE FILE

EDIT

Fax Images

File information

1 of 6

appsampl.tif

For more information : <http://www.aquaforest.com>

**FAX MESSAGE**

**Agostini Nurse Staffing**  
-A Division of Agostini & Associates, Inc.-  
"Celebrating 21 Years Of Clinical Excellence"

To: [REDACTED], Processing

From: Karen M. Brewer

Fax: [REDACTED]

Date: 9/6/07

Subject: Agostini & Associates, Inc.

Pages: 6  
(INCLUDING COVER SHEET)

Please enroll the following employee on our health insurance plan effective September 1, 2007.

NAME	GROUP NO.	1500 Value Plan	Hire Date
[REDACTED]	#060771	1500 Value Plan	8-28-07
[REDACTED]	#060771	1500 Value Plan	8-26-07
[REDACTED]	#060771	1500 Value Plan	8-24-07
[REDACTED]	#060771	1500 Value Plan	8-31-07
[REDACTED]	#060771	1500 Value Plan	8-31-07

Please contact me immediately if you need more information, or have any questions. You may reach me at 800-823-0570 ext. 202, or by email at: [karen@nursesstaffing.com](mailto:karen@nursesstaffing.com).

Best regards,  
Karen M. Brewer

Karen M. Brewer  
Director, Human Resources  
1-800-823-0570 extension 202  
Toll Free FAX: 1-866-207-2217

File ID: 0001

Module: Subscriber Maintenance

Request Format: Fax

Unique Fax ID: SG\_0001

Inbound Receipt #: 222-2222

Fax Received from #: 111-1111

Date/Time of Receipt: 11/21/2008 11:18

File Metadata

Customer No.: 12345678

Group Name: American Inc

Subscriber Name: Subscriber Name

Subscriber/SSN/Cert #: Subscriber SSN

Tracking Type:

Assigned To: John Doe

Status: Eligibility Working

Type Of Work: Exceptions

Subtype Of Work: No

Access to Care: ☐

One Stop: ☒

Priority: ☒

Description: Some Description Text

Count: 1

Type of File: Parent

Completion Notification Data

Completion Notification: ☐ Yes ☒ No

Send Completion Notification as: ☒ email ☐ fax

## The SgSMART App

The SgSMART web-based tool offers Payers a simplified way to conduct basic maintenance and renewal activities for employer groups.

SgSMART	Clerical	Subscriber Maintenance	Group Maintenance	UW	Search	Output & Reporting	Administration																																												
<div> <a href="#">Received Requests</a> <a href="#">Pend Responses</a> <a href="#">My Work</a> <a href="#">Supervisor View</a> <a href="#">Groups Management</a> </div>																																																			
File ID:	Customer No.:	Group Number:	Group Name:	Subscriber Name:	Subscriber/SSN/Cert. #:	Access To Care: Any	One Stop: Any																																												
Type Of Work: Any	TOW Subcategory: N/A	Request Format: Any	Status: Any	<a href="#">SHOW LIST</a>																																															
<div>Files List <a href="#">GET NEXT</a></div> <table border="1"> <thead> <tr> <th>File ID</th> <th>Unique Fax ID</th> <th>Group Name</th> <th>Received Date</th> <th>Created Date</th> <th>Type Of Work (Subcategory)</th> <th>Request Format</th> <th>Status</th> <th>Access To Care</th> <th>One Stop</th> <th>Priority</th> </tr> </thead> <tbody> <tr> <td>0001</td> <td>SG_341</td> <td>Providence Health System, Southern California</td> <td>09/28/2007</td> <td>09/29/2007</td> <td>Terminations</td> <td>Fax</td> <td>Eligibility Pend Information Received</td> <td>Yes</td> <td>Yes</td> <td>No</td> </tr> <tr> <td>0002</td> <td>SG_342</td> <td>MAG Aerospace dba Monogram Systems</td> <td>09/29/2007</td> <td>09/29/2007</td> <td>Terminations</td> <td>Fax</td> <td>Eligibility Pend</td> <td>Yes</td> <td>Yes</td> <td>No</td> </tr> <tr> <td>0004</td> <td>SG_343</td> <td>Universal Cycles</td> <td>09/29/2007</td> <td>09/29/2007</td> <td>Mixed Request</td> <td>Fax</td> <td>Eligibility Working</td> <td>No</td> <td>No</td> <td>No</td> </tr> </tbody> </table>								File ID	Unique Fax ID	Group Name	Received Date	Created Date	Type Of Work (Subcategory)	Request Format	Status	Access To Care	One Stop	Priority	0001	SG_341	Providence Health System, Southern California	09/28/2007	09/29/2007	Terminations	Fax	Eligibility Pend Information Received	Yes	Yes	No	0002	SG_342	MAG Aerospace dba Monogram Systems	09/29/2007	09/29/2007	Terminations	Fax	Eligibility Pend	Yes	Yes	No	0004	SG_343	Universal Cycles	09/29/2007	09/29/2007	Mixed Request	Fax	Eligibility Working	No	No	No
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Page 1 of 1			1			Count: 1																																													
Items per page: 10																																																			

## Challenge

Renewal of employer groups can be a highly manual process, given the number of systems and departments involved. Additionally, requests can be received any number of ways, from faxes, emails and paper requests.

The client required a way to standardize intake and facilitate the highly complex and error fraught process.

## Solution

By standardizing the inputs into a digital format with a single data source, the workflow could be managed based on a complex set of predefined rules. With a predictable workflow process in place, not only could work be tracked to the individual work item, but analytics of the entire process could be provided as well.

SgSMART	Clerical	Subscriber Maintenance	Group Maintenance	UW	Search	Output & Reporting	Administration
UW: Year to Date Totals Worked by Underwriter							
<div> Request Format: Any </div> <div> UW Processor: <ul style="list-style-type: none"> <li>Any</li> <li>FEA</li> <li>Angelo, Aundrea</li> <li>Avanzado, Fidel</li> <li>Carademos, Kim</li> </ul> </div> <div> Year: 2008 </div> <div> Access to Care: Any </div> <div> One Stop: Any </div> <div> Priority: Any </div> <div> <a href="#">BACK</a> <a href="#">SHOW REPORT</a> </div>							

## Benefits



### Process transparency

By automating the renewal process, identification of specific work items in the process and assignment of those items is now possible.



### Lower costs

By eliminating the need to manually track paper, administrative costs were virtually eliminated.



### Reduction in processing time

By automating the workflow through business rules and work queues, average renewal processing times went from a month to a few days.



### Improved quality and customer satisfaction

Reduction in processing time for each request and elimination of “misplaced” paperwork improved the perception of the client’s request-handling capabilities. As a result, the solution drove performance levels beyond competitive benchmarks, delivering significant value for the client in the eyes of their customers.

## For more information, talk with us!

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