

Establish Business Relationship

BR Standards Management	
Establish Business Relationship	
Item	Details
Description	The Establish Business Relationship business process encompasses activities undertaken by the State Medicaid Agency (SMA) to enter into business partner relationships. Agreements are between state agency and its partners, including collaboration amongst intrastate agencies, the interstate and federal agencies. It contains functionality for interoperability, establishment of inter-agency service agreements, identification of the types of information exchanged, and security and privacy requirements. These include Trading Partner Agreements (TPA), Service Level Agreements (SLA), and Memoranda of Understanding (MOU) with other agencies; Electronic Data Interchange (EDI) agreements with providers, Managed Care Organizations (MCOs), and others; and Centers for Medicare & Medicaid Services (CMS), other federal agencies, and Regional Health Information Organizations (RHIO).
Trigger Event	Environment-based Trigger Events to include but not limited to: <ul style="list-style-type: none"> Request made for business relationship (e.g., EDI, email, mail, facsimile, telephone). Identification of the need for a business relationship (e.g., new policy, new program).
Result	<ul style="list-style-type: none"> The SMA agrees upon Business Relationship with business partner. Defined communication protocols for data exchange. Alert to send notification to business partner of agreement. Established agreement between business partners (e.g., TPA, SLA, MOU). Tracking information as needed for measuring performance and business activity monitoring.
Business Process Steps	<ol style="list-style-type: none"> START: Receive request for business relationship from partner. Conduct collection of agreement information with other party. Validate information submitted is correct and as complete as possible. Information complies with syntax criteria and requestor completes all required fields. Validate that the provided information is authentic. Decide determination for establishment of relationship. If no agreement, go to step 9. Establish terms of the business relationship (e.g., TPA, SLA, MOU). Establish Key Performance Indicator (KPI). Establish payment agreements. Establish data exchange requirements.

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	10. Establish authentication protocol. 11. Establish security protocol. 12. Establish privacy requirements. 13. Agreement on business relationship. 14. END: Send alert to notify business partner of agreement.
Shared Data	Business Partner data store including service agreement information Contractor data store including contract information
Predecessor	Receive Inbound Transaction Award Contract Enroll Provider Maintain Program Policy Maintain State Plan
Successor	Send Outbound Transaction Manage Business Relationship Information Manage Business Relationship Communication
Constraints	Federal and state policies and regulations will constrain these agreements.
Failures	<ul style="list-style-type: none"> Parties are unable to agree on terms of relationship.
Performance Measures	<ul style="list-style-type: none"> Time to complete business process = within __ days Accuracy with which edits are applied = ____% Consistency of decisions and disposition = ____% Error rate = __% or less

Manage Business Relationship Communication

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Item	Details
Description	The Manage Business Relationship Communication business process receives requests for information, appointments, and assistance from business partners, such as inquiries related to a Service Level Agreement (SLA). This business process includes the log, research, development, approval and delivery of routine or ad hoc messages. Information communicated by a variety of methods such as email, mail, publication, mobile device, facsimile, telephone, web or Electronic Data Interchange

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	(EDI).
Trigger Event	<p>Interaction-based Trigger Events to include but not limited to:</p> <ul style="list-style-type: none"> Receive requests from other business processes to develop and produce communications for business partners such as alerts from Establish Business Relationship business process. Receive inquiries originating from customer help desk through Manage Business Relationship Information business process. <p>Environment-based Trigger Events to include but not limited to:</p> <ul style="list-style-type: none"> Receive inquiry from business partner. Request to send information packages such as a SLA or a Key Performance Indicator (KPI). Receive request for assistance, such as a request for training or change in business partner information. Periodic timetable (e.g., monthly) is due for sending information (e.g., within 24 hours of new business partner agreement and periodic communications such as newsletters or other agency communications).
Result	<ul style="list-style-type: none"> Business partner receives appropriate assistance, communication, and/or information packages. Tracking information as needed for measuring performance and business activity monitoring.
Business Process Steps	<ol style="list-style-type: none"> START: Receive request for communication. Validate information submitted is correct and as complete as possible. Information complies with syntax criteria and requestor has completed all required fields. Validate that the provided information is authentic. Agency logs request for communication. Determine content and method of communication (e.g., email, mail, publication, mobile device, facsimile, telephone, web, or Electronic Data Interchange (EDI)). Prepare content that is linguistically, culturally, and competency appropriate for the communication in agreed upon format. Review and approve communication. Generate communication in agreed upon format. Agency logs communication message. END: Evaluate the efficacy of the communication (e.g., customer satisfaction, first time resolution rate).
Shared Data	Business Partner data store including service agreements information

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	Contractor data store including contract information
Predecessor	Receive Inbound Transaction Establish Business Relationship Manage Business Relationship Information Terminate Business Relationship Maintain State Plan Manage Health Plan Information Manage Health Benefit Information
Successor	Send Outbound Transaction Manage Performance Measures
Constraints	<p>The State Medicaid Agency (SMA) and its business partners agree on the content of the communications. Content depends on the business relationship. Content may be standards-based. Communication complies with federal and state regulations that may vary by state.</p> <p>Business partner may have communication barriers such as lack of internet or phone access. Business partner is unable to access needed or requested information.</p>
Failures	<ul style="list-style-type: none"> The SMA is unable to provide linguistically, culturally, or competency appropriate information. Delivery failures due to erroneous contact information or lack of contact information.
Performance Measures	<ul style="list-style-type: none"> Time to complete response: By phone __ minutes; by email __ hours; by mail __ days Accuracy of communications = __% Communications successfully delivered = __%

Manage Business Relationship Information

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Description	The Manage Business Relationship Information business process maintains the agreement between the State Medicaid Agency (SMA) and the other party such as the intrastate, interstate, and federal agencies. This includes routine modifications to required information such as authorized signers, addresses, terms of agreement, Key Performance Indicator (KPI), and data exchange standards.

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Trigger Event	Environment-based Trigger Events to include but not limited to: <ul style="list-style-type: none"> Receive agreement modifications (e.g., create, update, or delete).
Result	<ul style="list-style-type: none"> Modified business relationship agreement. Alert to send notification to business partner of agreement. Tracking information as needed for measuring performance and business activity monitoring.
Business Process Steps	<ol style="list-style-type: none"> START: Receive agreement updates. Agency logs request for modification. Validate information submitted is correct and as complete as possible. Information complies with syntax criteria and submitter has completed all required fields. Validate that the provided information is authentic. Staff records modification to business relationship agreement. END: Send alert to notify business partner of modification.
Shared Data	Business Partner data store including service agreement information Contractor data store including contract information
Predecessor	<i>Establish Business Relationship</i> <i>Manage Contract</i>
Successor	<i>Send Outbound Transaction</i> <i>Manage Business Relationship Communication</i> <i>Terminate Business Relationship</i>
Constraints	Modifications include all information in the agreement, and depend on the type of agreement and service level requirements associated with the agreement.
Failures	<ul style="list-style-type: none"> Information does not comply with syntax criteria. Not all required information provided. Staff is unable to authenticate information provided.
Performance Measures	<ul style="list-style-type: none"> Time to complete business process = within __ days Accuracy with which edits are applied = __% Consistency of decisions and disposition = __% Error rate = __% or less

Terminate Business Relationship

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Description	The <i>Terminate Business Relationship</i> business process cancels the agreement between the State Medicaid Agency (SMA) and the business partner such as the intrastate, interstate and federal agencies.
Trigger Event	Environment-based Trigger Events to include but not limited to: <ul style="list-style-type: none"> • Receive request for termination of agreement from internal or external sources. • Notification that the agreement has expired or a one-time information exchange process is complete. • External sources could be a receipt of a vendor purchased by another.
Result	<ul style="list-style-type: none"> • Business Relationship terminated. The SMA does not share additional information. • Alert to send notification to business partner of termination. • Tracking information as needed for measuring performance and business activity monitoring.
Business Process Steps	<ol style="list-style-type: none"> 1. START: Receive request for business relationship termination. 2. Validate information submitted is correct and as complete as possible. Information complies with syntax criteria and requestor has completed all required fields. 3. Validate that the provided information authentic. 4. Evaluate impact of termination of business relationship to business operations. 5. Terminate business relationship and related Service Level Agreement (SLA), Memoranda of Understanding (MOU), and such. 6. END: Send alert to notify business partner of termination.
Shared Data	Business Partner data store including service agreements information Contractor data store including contract information
Predecessor	Receive Inbound Transaction <i>Manage Business Relationship Information</i> <i>Close Out Contract</i>
Successor	Send Outbound Transaction <i>Manage Business Relationship Communication</i>
Constraints	The SMA and its business partners agree on the content of the termination message. Content depends on the business relationship. Content is standards-based.

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Failures	<ul style="list-style-type: none"> • Information does not comply with syntax criteria. • Not all required information provided. • Information provided not authenticated.
Performance Measures	<ul style="list-style-type: none"> • Time to complete business process = within __ days • Accuracy with which edits are applied = __% • Consistency of decisions and disposition = __% • Error rate = __% or less