TML Intergovernmental Employee Benefits Pool

// case study:

STATEWIDE EMPLOYEE BENEFITS GROUP INCORPORATES DOCUMENT MANAGEMENT PROCESSES THROUGHOUT ITS ENTIRE ORGANIZATION

What started as an isolated effort to implement electronic document management technology in the claims department of a non-profit employee health benefits group has expanded to a successful organizational-wide initiative.

At first, managers at TML Intergovernmental Employee Benefits Pool (TML IEBP) sought ways to increase efficiencies and replace a homegrown electronic system within a single department. However, after witnessing impressive process improvements and cost savings, the effort to incorporate electronic document management was broadened to include nearly every one of its departments over the course of several years.

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TML IEBP, based in Austin, TX, offers competitive health benefits and administrative services to eligible municipalities and other government entities in Texas. The pool, which consists of political subdivisions that join together to provide health benefits to employees, officials, retirees and dependents, serviced 837 member groups during 2011.

Originally, a homegrown electronic system was developed to help image paper-based claims documents. While the system proved to be helpful, it did not meet the pool's needs as the organization continued to grow. Through research, TML IEBP learned about Hyland Software's OnBase Enterprise Content Management (ECM) software suite with core capabilities in document imaging, electronic document management, workflow and records management and were connected with KeyMark, an award-winning document management solution provider headquartered in South Carolina.

KeyMark helped TML IEBP with its initial OnBase installation in the claims department and helped engineer the solution to not only image, index and store documents in an easy-to-use electronic format, but to also automate functions. Through electronic workflow, claims are now automatically approved, paid, and flagged for follow-up attention when specified parameters are not met.

"Once we'd successfully mastered electronic document management in the claims department and were seeing great results, we decided to move on to our medical management department where we focused on automated electronic forms," said Mona Gamble, IT manager. "The forms that are created electronically are routed to our medical management team for completion and to our claims team when pre-authorizations are needed. The system allows us to easily track where things are in the approval and routing process at any time."

Additional Departments Adopt Electronic Document Management Technology

Managers at TML IEBP didn't plan initially to take the document management system enterprise-wide. "As it helped us become more efficient, we kept thinking of ways document management could help us in other departments," said Danny McAdams, support services manager.

![TML Intergovernmental Employee Benefits Pool logo]

To help handle the complex paper flow in TML IEBP's billing and eligibility department, a robust workflow system was established. Multitudes of member enrollment forms, changes in enrollments, and termination documents are now scanned, indexed, and placed into the correct workflow queue for needed approvals and follow-up. Even the pool's custom online enrollment system is synchronized to work with the rest of TML IEBP's processes. KeyMark helped the pool engineer a process that imports enrollment system data into TML IEBP's document management solution and sends it to workflow queues within the billing and eligibility department.

Throughout the years, as TML IEBP has faced various technology challenges, KeyMark has worked with the pool in engineering solutions to fit its unique needs. This includes the creation of specialized "hot keys" for instantaneous image retrieval, processes for exporting and importing data from various outsource companies and systems and modifications to accommodate correspondence that doesn't fit typical formats. "We rely on KeyMark quite a bit," said Gamble. "They've been with us from the beginning and are very familiar with our system. All we have to do is outline the specifications of what we're trying to accomplish and they ensure we meet our goals."

Some of the other departments utilizing electronic document management at TML IEBP include human resources (for document storage), quality management (for audit storage) and accounting (for automating accounting processes).

Electronic document management has even helped TML IEBP's legal department. Now, documentation associated with right of recovery is electronically indexed and stored, freeing up paper storage space and providing faster reference access. Through electronic forms, members may submit appeals online, which are automatically indexed and rolled into an electronic workflow process for attention.

Pool Continues to See Long-Term Results from Document Management

The TML IEBP team reports many positive results from the various document management solution implementations throughout their organization. "One unexpected positive is how much it's helped us prioritize tasks. Now that we have complete records of where documents are in the work process, we realize our top priorities and manage our time better," says Gamble. "We've also seen a huge decrease in the amount of paper we handle and store, and we no longer lose documents."

The solution has also been a great resource tool for TML IEBP in planning future activities by enabling employees to analyze data and run reports on past activities. In departments such as medical management, the solution has freed up employees time to concentrate on other important tasks. "Previously, the nurses had to stop to do clerical work, now they have more time to focus on patient care," said McAdams.

Compliance is another area TML IEBP has seen positive results. With defined retention rules, the pool is finding it easier to stay in compliance with various public records guidelines. Furthermore, the pool is finding they are better prepared to meet turnaround times required by various business partners.

"Conducting business with the help of electronic document management has been a huge benefit to our entire organization," said Gamble. "KeyMark has played an important role in helping us improve our business. They help us analyze our current processes and give us recommendations for how we can streamline what we're doing. Before an implementation, we're often shocked at how much paper we're pushing and how complicated our steps are. KeyMark is always quick to respond to our needs and guide us as we continue to improve our processes."

The Challenge:
To replace TML IEBP's home-grown electronic system with electronic document management for scanning and process improvements within its claims department.

The Solution:
In the last 10 years, TML IEBP has implemented electronic document management in nearly every one of its departments for scanning, imaging, storing and advanced workflow processes.

The Results:
The pool has automated processes previously completed manually, is in a better position to plan and prioritize tasks, decreased storage needs, stayed in better compliance, decreased costs and freed up employees to focus on other important tasks.