

Pega Collaborative
Healthcare Summit
2017



UPMC Health Plan – Claims Workflow System

Claims Inventory Management

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Who we are



70,000 employees

**25 Million
Claims
Annually**



Awards and Recognition



Out of 8 PA Regional plans in overall claims processing performance



“Highest Member Satisfaction among Commercial Health Plans in Pennsylvania”

UPMC HEALTH PLAN

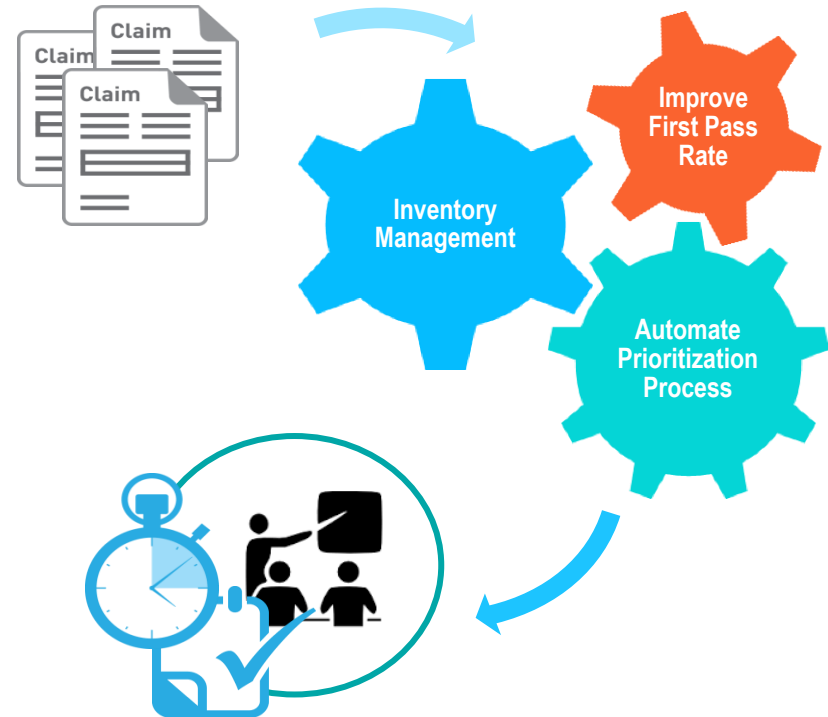
Business Challenges



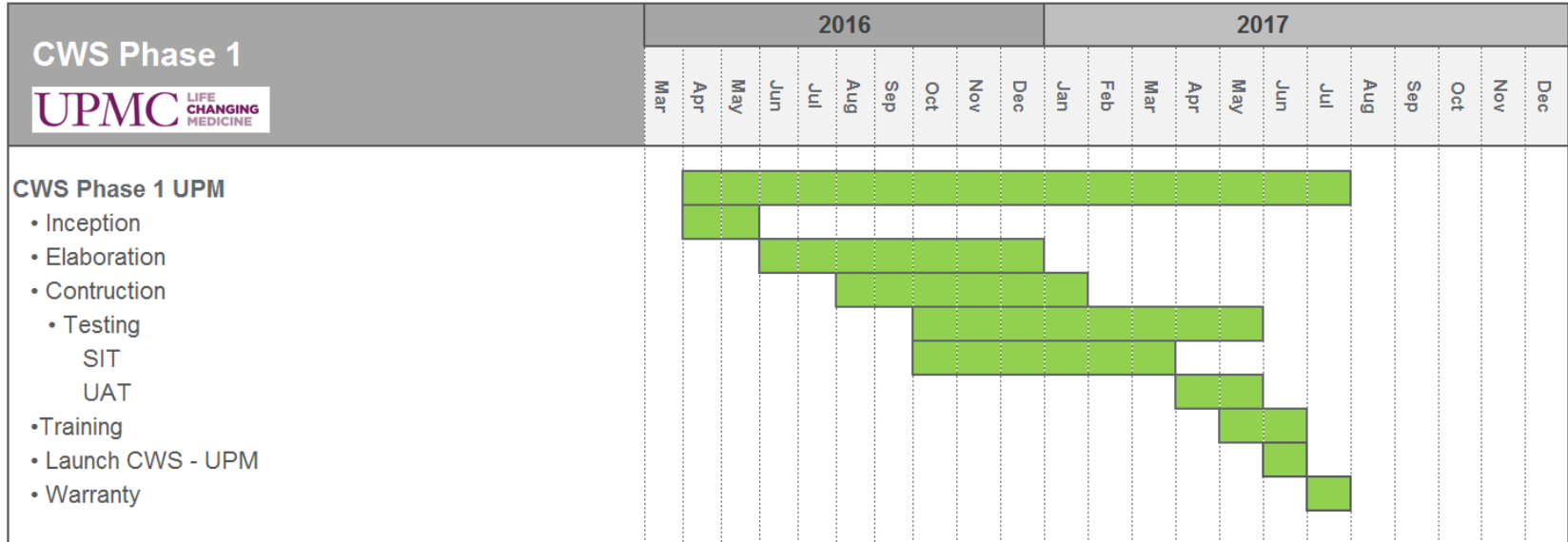
Opportunities

Opportunities for measurable positive business impacts:

- Improvement in the first pass rate through automation
- Improved claims inventory management
- Automation of the claims prioritization process
- Increased compliance
- Better reporting of throughput
- Training cost savings from rule-based, guided processing



Project timeline



- **Total Implementation time** - 68 weeks from Inception to launch (April 2016 to July 2017)

Benefits



Enterprise Visibility to Workflow



Ability to Move Workloads in Real-time



Real-time Production insight for Employees and Management



Screen Pop of Production & Claim Images



Audit Trail

Productivity Report

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment Shutt, Ryan

Dashboard My Work Transfer Work Configuration Reports

Recent

- Pended Claim (C-947602)
- Pended Claim (C-1096864)
- Pended Claim (C-951431)
- Pended Claim (C-945386)
- Pended Claim (C-951812)

Team Productivity

Generated on September 27, 2017 02:49:58 PM

Team Productivity: Select Date Range

Start Date* 09/27/2017 End Date* 09/27/2017

Operator	Supervisor	Processing Time (HH:MM)	Claims Resolved	Pend Codes Resolved
Brandon	Sonja	00:00	25	48
Michelle	Sonja	06:00	72	101
Shanequa	Sonja	06:44	136	205
Courtney	Sonja	04:51	99	158
Robyn	Sonja	05:37	158	274
David	Sonja	05:47	149	236
Aja	Sonja	04:29	117	193

Productivity Report

- Dashboard
- My Work
- Transfer Work
- Configuration
- Reports
- Recent**
 - Pended Claim (C-947602)
 - Pended Claim (C-1096864)
 - Pended Claim (C-951431)
 - Pended Claim (C-945386)
 - Pended Claim (C-951812)

Team Productivity Actions

Generated on September 27, 2017 02:54:56 PM

Team Productivity > Michelle Sonja > 09/27/2017 • Michelle Sonja • 06:00•73

Displaying 50 records

1 2 Next

Claim ID	Claim Number	Pend Codes Resolved	Claim Resolved by Operator	Total Billed	CWS Status
C-884847	Z5264225E20170809	1	Yes	29.1	Resolved-Completed
C-890041	Z5304567E20170428	2	Yes	943.12	Resolved-Completed
C-892207	Z5340211120170823	1	Yes	2.862	Resolved-Completed
C-892235	Z5340881120170807	2	Yes	2.475	Resolved-Completed
C-892241	Z5340921120170807	2	Yes	1.782	Resolved-Completed
C-892271	Z5341187120170809	2	Yes	940.5	Resolved-Completed
C-892557	Z5343279120170808	2	Yes	3.069	Resolved-Completed
C-892600	Z5343411120170806	2	Yes	396	Resolved-Completed
C-892606	Z5343447120170807	2	Yes	4.653	Resolved-Completed
C-892609	Z5343467120170807	2	Yes	5.383.13	Resolved-Completed
C-892650	Z5343699120160302	2	Yes	331.1	Resolved-Completed
C-892780	Z5344545120170807	2	Yes	1,546.88	Resolved-Completed
C-892782	Z5344557120170808	2	Yes	1,188	Resolved-Completed
C-892804	Z5344663120170731	2	Yes	511.7	Resolved-Completed

CWS Work Item – Pend Code History

UPMC HEALTH PLAN
Claims Workstation+ → Next Assignment
c-1025952
 Shutt, Ryan

Dashboard

My Work

Transfer Work

Configuration

Reports

Recent

Pended Claim (C-1025952)

Pended Claim (C-947602)

Pended Claim (C-1096864)

Pended Claim (C-951431)

Pended Claim (C-945386)

Claim ID: C-1025952

Claim ID: C-1025952
Claim Status: Resolved-Completed
Claim Age (Days): 16
Client Name: UPMC
Category: Pended
Pend Code: CI
Audit Status Indicator: C
Received Date: 09/11/2017
Claim Type: Institutional
Provider Status: P

Claim Header	Claim Line	Member	Provider	Pend Codes	Conversation Log
Pend Code	Description	Resolved Date	Resolved Time	Operator ID	Operator Name
17	CLM: POSSIBLE DUPLICATE	09/27/2017	08:59:00	btest	Brandon
AE	CLM: HOLD TO CLAIMS DEPT FOR AUTH ISSUES	09/27/2017	11:05:18	rtest	Robin
AD	CLM: RETURN TO CLAIMS DEPARTMENT	09/27/2017	11:48:25	btest	Brandon
A9	CLM: HOLD FOR REVIEW OF PDN CLAIMS	09/27/2017	11:48:49	btest	Brandon

Actions ▾

Close

CWS Work Item – Claim Header

UPMC HEALTH PLAN
Claims Workstation+ [→ Next Assignment](#)

Shutt, Ryan

Dashboard

My Work

Transfer Work

Configuration

Reports

Recent

Pended Claim
(C-1025952)

Bulk Actions

Pended Claim
(C-942983)

Pended Claim
(C-903005)

Pended Claim
(C-635482)

Claim ID: C-1025952

Actions ▼
Close

Claim ID	Claim Status	Claim Age (Days)	Client Name	Category	Pend Code	Audit Status Indicator	Received Date	Claim Type	Provider Status
C-1025952	Resolved-Completed	16	UPMC	Pended	CI	C	09/11/2017	Institutional	P

<u>Claim Header</u>	Claim Line	Member	Provider	Pend Codes	Conversation Log	
<p>Claim Number 27398115120170417</p> <p>Actual Visits 0</p> <p>Referring Provider 250099</p> <p>Total Charge \$1,512.53</p> <p>Service From Date 04/17/2017</p> <p>Skill Required ClaimExaminer</p>					<p>Authorization Number D2389608</p> <p>Claim Submission Type OCR</p> <p>Place of service 12</p> <p>Principal Diagnosis R26.89</p> <p>Service To Date 04/21/2017</p>	<p>Authorized Visits 0</p> <p>IPA 01</p> <p>Bill Type 323</p> <p>Secondary Diagnosis ---</p> <p>Document ID 17254f410058</p>

CWS Work Item – Claim Detail

UPMC HEALTH PLAN
Claims Workstation+ → Next Assignment

Shutt, Ryan

Dashboard Claim ID: C-1025952 Actions Close

My Work

Transfer Work

Configuration

Reports

Claim ID	Claim Status	Claim Age (Days)	Client Name	Category	Pend Code	Audit Status Indicator	Received Date	Claim Type	Provider Status
C-1025952	Resolved-Completed	16	UPMC	Pended	CI	C	09/11/2017	Institutional	P

Claim Header **Claim Line** Member Provider Pend Codes Conversation Log

Line Number	Procedure Code	Claim Line Summary		
001000	S9122AI	Units	Benefit Level	Benefit Category
002000	S9122AI	9	MH0000	HHC
003000	S9122AI	Billed Amount	Service From Date	Service To Date
004000	S9122AI	\$248.33	04/17/2017	---
005000	S9122AI	Line Receive Date	Authorization Number	Allowed Amount
006000	S9122AIA	09/11/2017	---	\$248.33
		Not Covered Amount	Not Covered Reason	Deductible Amount
		\$248.33	13	\$0.00
		Copay Amount	Co-Insurance Amount	Net Amount
		\$0.00	\$0.00	\$0.00
		Revenue Code		
		0989		

Recent

- Pended Claim (C-1025952)
- Bulk Actions
- Pended Claim (C-942983)
- Pended Claim (C-903005)
- Pended Claim (C-635482)

CWS Work Item – Member

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment Shutt, Ryan

Dashboard Claim ID: C-1025952 Actions Close

My Work

Claim ID	Claim Status	Claim Age (Days)	Client Name	Category	Pend Code	Audit Status Indicator	Received Date	Claim Type	Provider Status
C-1025952	Resolved-Completed	16	UPMC	Pended	CI	C	09/11/2017	Institutional	P

Configuration

Reports

Claim Header Claim Line **Member** Provider Pend Codes Conversation Log

Subscriber Patient

Subscriber Information

Subscriber Number	0000000101	Full Name	DEFAULT, MEMBER	Plan Code	J00
Plan type	D	Group Number	MA0034	Sub-Group Number	400
Birth Date	8/21/2009	Gender	Male		

Recent

- Pended Claim (C-1025952)
- Pended Claim (C-635482)
- Pended Claim (C-903005)
- Pended Claim (C-942983)

Bulk Actions

CWS Work Item – Provider

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment

Search: Shutt, Ryan

Dashboard Claim ID: C-1025952 Actions Close

My Work

Transfer Work

Configuration

Reports

Claim ID	Claim Status	Claim Age (Days)	Client Name	Category	Pend Code	Audit Status Indicator	Received Date	Claim Type	Provider Status
C-1025952	Resolved-Completed	16	UPMC	Pended	CI	C	09/11/2017	Institutional	P

Claim Header Claim Line Member **Provider** Pend Codes Conversation Log

Billing Servicing

Provider Number V0U777	Provider Name BAYADA HOME HEA	Specialty INST-HOMEH
Tax ID 231943113	NPI 1669401790	

Recent

- Pended Claim (C-1025952)
- Bulk Actions
- Pended Claim (C-942903)
- Pended Claim (C-903005)
- Pended Claim (C-635482)

Claims Work Source Report

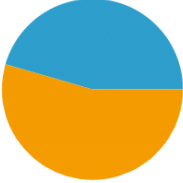
UPMC HEALTH PLAN Claims Workstation+ → Next Assignment 🔍 👤 Shutt, Ryan

Claims Work Source

Generated on **September 27, 2017 01:09:29 PM**

Claims Work Source : Select Date Range

Start Date ★ **09/27/2017** End Date ★ **09/27/2017**



● Outside CWS ● via Next Assignment

Total Claims ▲	Count
Total Claims Retrieved Outside of CWS	3301
Total Claims Retrieved From CWS	3950

Claims Work Source Report

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment c-947602 Shutt, Ryan

Individual Productivity

Generated on September 27, 2017 03:03:41 PM

Individual Productivity: Select Date Range And Operator

Start Date* 09/27/2017 End Date* 09/27/2017 Operator* diazpa

Operator	Supervisor	Processing Time (HH:MM)	Claims Resolved	Pend Codes Resolved
Patricia	Jeff	00:00	145	176

Recent

- Pended Claim (C-947602)
- Pended Claim (C-1096864)
- Pended Claim (C-951431)
- Pended Claim (C-945386)
- Pended Claim (C-951812)

Claims Work Source Report – Audit Trail

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment c-947602 Shutt, Ryan

Dashboard Claim ID: C-947602 Actions Close

My Work

Claim ID	Claim Status	Claim Age (Days)	Client Name	Category	Pend Code	Audit Status Indicator	Received Date	Claim Type	Provider Status
C-947602	Resolved-Completed	22	UPMC	Pended	AS	C	09/05/2017	General	P

Transfer Work

Configuration

Reports

Claim Header Claim Line Member Provider **Pend Codes** Conversation Log

Pend Code	Description	Resolved Date	Resolved Time	Operator ID	Operator Name
62	CLM: HOLD FOR PWK EB & HG	09/27/2017	09:09:12	patest	Patricia
AS	CLM: COB CARRIER DOES NOT MATCH MEMBER COB RECORD	09/27/2017	09:09:32	patest	Patricia

Recent

- Pended Claim (C-947602)
- Pended Claim (C-1096864)
- Pended Claim (C-951431)
- Pended Claim (C-945386)
- Pended Claim (C-951812)

Inventory Report

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment Shutt, Ryan

UPMC Inventory Report

Generated on **September 27, 2017 12:10:25 PM**

UPMC Inventory Report > CBO

[Collapse all group headings](#)

UPMC Inventory	0-7 Days	8-10 Days	11-14 Days	15-24 Days	25-29 Days	30-60 Days	+60 Days	Total Claims	Total Dollar Amount
ALL	10902	3498	4545	6144	207	382	8392	34070	\$278,121,026.68
Non-Workable	538	214	265	482	81	350	8351	10281	\$85,951,806.17
Workable	10364	3284	4280	5662	126	32	41	23789	\$192,169,220.51

Inventory Report

UPMC HEALTH PLAN
Claims Workstation+ → Next Assignment

Shutt, Ryan

Dashboard

My Work

Transfer Work

Configuration

Reports

Recent

Bulk Actions

Pended Claim (C-942983)

Pended Claim (C-903005)

Pended Claim (C-1025952)

Pended Claim (C-635482)

UPMC Inventory Report

Generated on **September 27, 2017 12:10:47 PM**

[UPMC Inventory Report > CBO > Workable](#)

[Collapse all group headings](#)

LOB	0-7 Days	8-10 Days	11-14 Days	15-24 Days	25-29 Days	30-60 Days	+60 Days	Total Claims	Total Dollar Amount
▣ ALL	10363	3284	4280	5662	126	32	40	23787	\$192,161,477.51
Commercial	3822	1376	1130	2438	68	13	15	8862	\$61,287,221.92
Default	0	1	0	0	0	0	0	1	\$16,282.25
Medicaid	3613	941	1918	1028	43	13	24	7580	\$56,237,905.51
Medicare	2928	966	1232	2196	15	6	1	7344	\$74,620,067.83

Actions
✕

Pend Code Report

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment 🔍 👤 Shutt, Ryan

Dashboard
My Work
Transfer Work
Configuration
Reports

Recent
Bulk Actions
Pended Claim (C-942983)
Pended Claim (C-903005)
Pended Claim (C-1025952)
Pended Claim (C-635482)

Pend Code Report

Generated on September 27, 2017 12:11:46 PM

Actions ▾ ✕

Pend Code Report: Select Date Range

Start Date* 09/27/2017 End Date* 09/27/2017

[Expand all group headings](#)

Pend Code	Pend Code Description	Total Pend Codes Resolved	Average Cycle Time (MM:SS)
<input type="checkbox"/> ALL		6231	2:44
<input type="checkbox"/> 03		248	1:4
<input type="checkbox"/> 06		1	3:5
<input type="checkbox"/> 08		313	1:22
<input type="checkbox"/> 10		2	0:58
<input type="checkbox"/> 12		360	2:2

Dashboards

- Examiner Dashboard

UPMC HEALTH PLAN Claims Workstation+ → Next Assignment 🔍 👤 Shutt, Ryan

My Work My Work

Recent

- Pended Claim (C-947602)
- Pended Claim (C-1096864)
- Pended Claim (C-951431)
- Pended Claim (C-945386)
- Pended Claim (C-951812)

My Tasks [Refresh list](#)

Urgency	Due	Claim ID	Client ID	Claim #	Pend	LOB	Category	Claim Status
No work assigned								

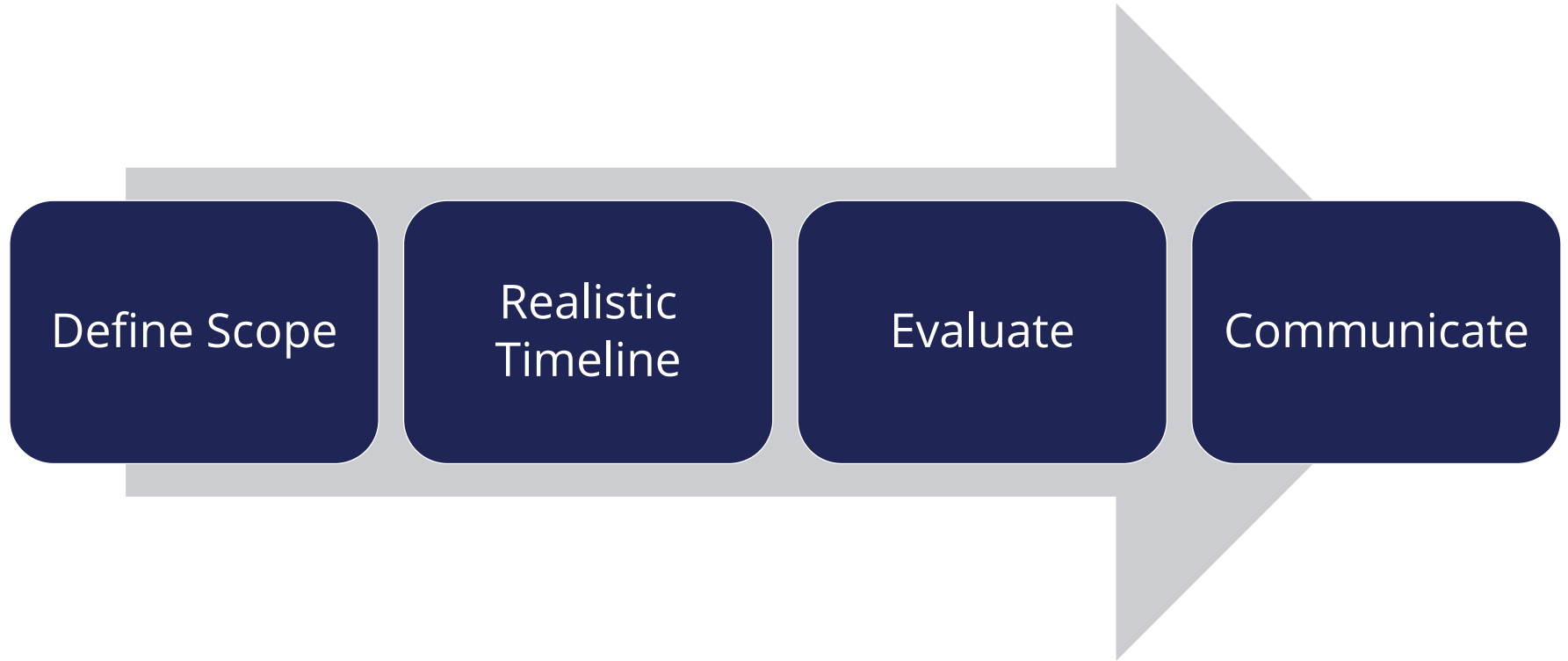
My Productivity

Date	Operator	Processing Time per Day	Pend Codes Resolved	Claims Resolved	On Hold	Transferred
09/27/2017	Ryan	01:14	3	8	0	2
09/26/2017	Ryan	00:26	6	5	0	10
09/25/2017	Ryan	00:08	8	7	0	0
09/21/2017	Ryan	01:05	5	1	0	410
09/20/2017	Ryan	01:14	0	0	0	104
09/19/2017	Ryan	00:11	1	1	0	0
09/18/2017	Ryan	02:12	0	0	0	841
09/15/2017	Ryan	01:53	0	0	0	2,733

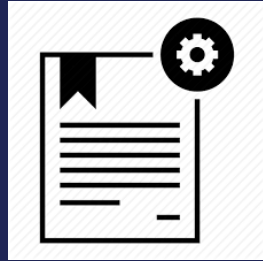
IT Hardware/Software Infrastructure utilized

- UPMC MC400 – HealthCare Payer Claims & Benefits Administrative Software
- Interface technologies utilized between UPMC MC400 & Hosted PEGA CWS Application
 - MQ (Messaging Queuing) – used to send pending Claim messages in an XML format from MC400 to PEGA CWS application servers.
 - SFTP (Secured File Transfer Protocol) – used to send large “batch files” for nightly Reconciliation and Locked claim extracts from MC400 to PEGA CWS application servers.
 - SSL (Secure Socket Layer) Certification applied to Iseries for encrypted communication between UPMC and Hosted PEGA Application servers.
- Multiple hosted PEGA CWS Application Servers by Third-Party Registered Pega Business Partner.

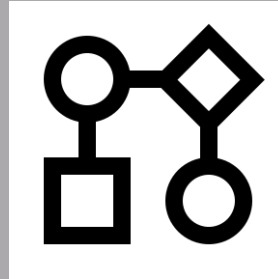
Keys to Success



Future State



**DEVELOP
STANDARDS**



**WORKFLOW
OPTIMIZATION**



**IMPLEMENT
PRE-
ADJUDICATION
EDITS**

Thank you



PEGA[®]

Build for Change[®]