NAVEX Customer Success Story

Security Health Plan Improves Workflow With PolicyTech

"Thanks to PolicyTech, we've reduced the amount of time spent by over 20%!"

Joshua Dick
Continuous Improvement Specialist

Highlights

Solution

INDUSTRY

Health Insurance

NUMBER OF EMPLOYEES

513

CHALLENGE

Fragmented policy management process without consistency or accountability.

SOLUTION

A consistent workflow for writing, reviewing and approving policies throughout the organization
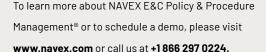
SINGLE-PRODUCT

PolicyTech®
POLICY & PROCEDURE MANAGEMENT

Challenge: Implement a Centralized, Effective Policy and Procedure Management Process

Security Health Plan was ready to take the next step in their policy management. The web-based system they were using didn't fit into a workflow. Security Health Plan's policy solution was disjointed. "We didn't have a system that officially collected who the writer, reviewer, or approver were or exactly when they had accomplished their step or easily see what edits were made to the policy over time" recounts Joshua Dick, the organization's Continuous Improvement Specialist. "There was not an electronic, automated review process. It was pretty much, 'I own and update the document, and we had to rely on non-technical means to remember to annually review, approve, and properly document the changes to the policies'"

The organization also had concerns about centralization and consistency. Their processes weren't standardized. Practices and workflows differed across business functions, creating confusion about access and ownership. There was also considerable fragmentation. According to Dick, "Multiple departments would have procedures for dealing with a given situation housed in different places. There was a real need to combine these into a single, shared process."

Security Health Plan explored the enterprise resource planning (ERP) solution used by their parent organization, Marshfield Health Systems, but found it not meeting the full need. "We determined that it had some of the functionality we were looking for, but we wanted more than what it had to offer."

Solution: PolicyTech Workflows Create Consistency and Accountability

Security Health Plan considered many different technologies and selected PolicyTech as its Policy Management solution. Dick points to several reasons why the organization selected the policy and procedure management software. "My favorite feature is the ability to redline. Now, when I send a document to the next person, they can't make a change without my knowing. That feature is critical for us."

The organization also enjoys PolicyTech's accessibility. "It's an easy tool to use. It works with Microsoft Word. I don't need to convert things into a PDF or worry about storage, because sharing is easy."

Dick also appreciates NAVEX's service and support. "When I contact NAVEX for any kind of support issues, they're responsive. They'll remote in if needed. If the problem can't be solved in a single session, they'll keep me posted on the issue and give me progress updates."

Work Smarter, Not Harder

- Access Important Policies and Procedures Anywhere
- Automate Your Workflow Process to Save Time and Resources
- Generate Audit-Ready Reporting On- Demand
- Ensure Employees Read and Understand Relevant Policies and Procedures
- Report Suspected Policy Violations Directly to EthicsPoint
- Optimize Globally

Results: Improved Efficiency and Effectiveness

Security Health Plan's adoption of PolicyTech has made it more efficient to produce their Medicare Advantage Evidence of Coverage and Annual Notice of Changes documents. "Thanks to PolicyTech, we've reduced the amount of time spent by over 20%!"

Other departments have also taken advantage of PolicyTech's capabilities. Security Health Plan's customer service department adapted the solution's keyword search functionality to direct their staff to key information when responding to customer questions and requests in real time.

Moving forward, Josh Dick looks forward to increasing the adoption of PolicyTech throughout the organization. "Security Health Plan has all policies in PolicyTech, but there are a lot of opportunities to migrate other files stored elsewhere to take advantage of PolicyTech's strengths, including reminding users to review the files and using an organized review workflow. As an organization, when opportunities arise and departments are looking for a way to better manage training documents, procedural files, or process maps to share with other departments, I tell them, 'You know what? Maybe PolicyTech can solve that for you.'"

Learn more to see if PolicyTech can solve that for you, too.

About Security Health Plan

Security Health Plan, a part of the Marshfield Clinic Health System, is a not-for-profit health maintenance organization. Security Health Plan is committed to improving members' health, managing health care costs, and providing access to a high-quality health care experience.