



Group Health Insurance Client Onboarding

Healthcare Services Company, United States.

CASE STUDY

mokxa

Industry: Healthcare & Insurance

Client Summary

The client is a national healthcare solutions company. Founded in 1980, they have grown to be the largest, independent third-party insurance administrator in the United States.

The client customizes self-insurance benefit solutions for their customers (typically small to medium size organizations). These solutions are designed to align their customers' organizational needs and insurance plans that best support their employees' needs.

Customer Onboarding is the client's business process to add new customers to their systems. Part of this process includes introducing the customer to the products and services of their insurer, such as policy information sheets, welcome packages, etc. The other part involves setting up downstream functions like payments, recurring enrollments, etc. This process is crucial for the client to establish a strong first impression on its customers, which in turn builds sustainable relationships.

Challenges

The onboarding process consisted of several manual activities, primarily managed through technologies like spreadsheets and local databases, which resulted in:

- Key systems like the Onboarding database and business documents were not integrated.
- Recurring activities like updating business rules, adding new products / services, and onboarding new customers required staff that's proficient in local technologies.
- Security risks due to lacking permission-based access.
- Issues inherent to manual processes like limited tracking, human errors, and inefficiencies.
- Hard to track Service Level Agreement (SLA) compliances and breaches. Lack of oversight for managing SLA breaches.

Solution

- **Create a single system of record** that integrates seamlessly with the client's critical systems like Enterprise Data Warehouse & Active Directory integration.
- **Build a UI based Record Management System** that allows business users to initiate, track, update and close the Onboarding process.
- **Enable supporting functions** like the ability to create new products and services, add / modify business rules, view reports / dashboards, user access management, etc.

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Capabilities

Delivered an **end-to-end Customer Onboarding platform** within 3 months on Joget, the solution automated over 10 business processes through 25 user screens. It empowers business users to take charge of their business activities by practically eliminating their dependency on technical expertise. Following are some highlights of this solution.

- ✓ An onboarding platform with digitized forms, automated business activities, integrated business rules, and orchestrated workflows.
- ✓ Controls and features are built-in to highlight delays, monitor execution timeframe, manage escalation matrix, and trigger alerts to effectively govern SLAs.
- ✓ Automated processes help staff focus on their tasks. Policies are baked into the design so one does not have to take extra steps to ensure compliance. Key Performance Metrics are part of the design as well to ensure quality and performance.
- ✓ Permission controlled environment ensures access level security. UI based user access management enables administrative users to manage permissions.
- ✓ Creating new products and services, and customizing them for each customer is templated so business users can achieve this without dependence on technical resources.
- ✓ End-to-end tracking of business activities and relevant data resulting in effective and accurate reporting. Overlays like executive dashboards and detailed data downloads ensure that the right type and views of data is available to the right users.
- ✓ Thorough and configurable auditability of all business activities is built in.

