
Case Study: Dallas ISD Medicaid Coordination Services Department Improves Claims Management Efficiency with Process Resource Centers

Challenge: To enable improved efficiencies for an organization that processes thousands of claims per week by reducing the errors, rework, extensive training, handholding, and long work hours associated with the complexity of managing the school district's Special Education Medicaid claims process.

Solution: Process Delivery Systems' PDFramework™ Process Resource Centers which are visual web frameworks customized with intuitive workflows specific to the department's environment and clickable links to the necessary resources used by the department.

Results: The PDFramework Process Resource Center has been implemented and in use for over a year. It has helped the organization gain extensive efficiency improvements:

- ✓ A school district Medicaid interactive, intuitive, and end-to-end claims management framework has been developed that makes the process not overwhelming
- ✓ The process flows and resources bring a visual layer of transparency, enabling all to quickly and clearly understand
- ✓ Learning curves have dramatically decreased while employee comprehension has increased
- ✓ There is a huge reduction in errors, rework, and extended work hours
- ✓ All necessary information is readily available at the employees' fingertips
- ✓ The organization now has a solid foundation for continued improvement

Background

School Health and Related Services (SHARS) and Medicaid Administrative Claiming (MAC) are two State of Texas interdependent programs by which Texas school districts receive reimbursements for certain expenses in support of special education students of families that qualify for Medicaid. The effectiveness with which a district manages the administration of these programs affects the district's total budget and cash flow anywhere from hundreds of thousands to millions of dollars.

SHARS and MAC administration is a complex endeavor. Until now, there has been no intuitive resource that adequately explains the SHARS and MAC administrative process end-to-end. To complicate the matter, the administration of these programs is also unique to each school district. Administration depends on a number of variables such as understanding the law and interpreting its implementation, the structure of the SHARS and MAC teams, the relationship with the Special Education department and Health Services department, the effectiveness of and the integration with the automated Special Education tracking system. As a result, how each school district approaches and administers SHARS and MAC will be unique. There are a wide variety of SHARS and MAC management and administration team structures throughout the state. The structures can range from a focused, centralized team with a defined management structure and billing staff, to a dispersed number of individuals across departments and physically dispersed, to one administrative individual who has this function along with a swamping number of other important tasks.

Process Owner Interview, Mr. Roscoe Lewis

Mr. Roscoe Lewis is the Medicaid Coordination Services (MCS) department manager. He articulates with Special Education, Financial Services, Health Services, and Management Information Systems departments of the Dallas Independent School District (ISD). He has an extensive medical background as a Physician Assistant. Mr. Lewis has been employed with the Dallas ISD for over 35 years. He has worked with the district's Medicaid management endeavours since 1992 and established the district's Medicaid Coordination Services (MCS) as a separate department in 2002.

Question: Now that you've had the SHARS and MAC Process Resource Centers (PRCs) implemented for a year, how do you feel about them? Are they really helping you?

Mr. Lewis: "Yes, they are helping us tremendously with improving efficiency and productivity in a number of areas. The Process Resource Centers captured the processes in a fashion that we could standardize upon and makes sense to users. Prior to implementing the SHARS and MAC Process Resource Centers our teams and supervisors were constantly recreating processes that were already developed. One of the main reasons for this was a lack of clear understanding of the SHARS and MAC processes. In many cases we would have two people doing the work of one through continued handholding or the reworking of errors."

We have frequent personnel turnover due to the utilization of temporary staff for billing. This results in a combination of new staff members and staff members that have been with us for a while. For new personnel, the PRCs are a great training tool. They help us orient new personnel to how we in the Dallas ISD MCS department manage SHARS and MAC. The Process Resource

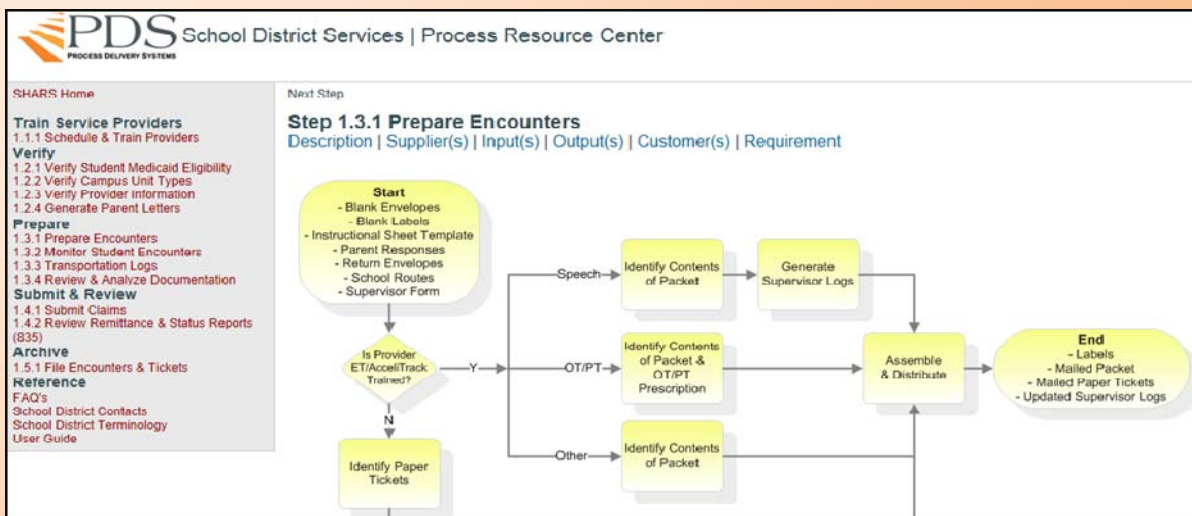
“Process Resource Centers illustrate the total process end-to-end and in sufficient detail that ensures we don’t inadvertently miss a step.”

Centers illustrate the total process end-to-end and in sufficient detail that ensures we don’t inadvertently miss a step. It enables us to walk new staff members through the process illustrations quickly and at a level that they clearly understand. With the PRCs being available to all users in our department on our network, new staff members can quickly access and dynamically navigate through the workflows to help them accomplish their assigned tasks correctly.



Process Resource Centers are Web sites which place process workflows and associated resources at the fingertips of users. Intuitive and easily accessed when needed during the normal course of business. Sophisticated workflows are segmented into visual units. Visual units are sequenced and connected in web pages.

The Process Resource Centers also help us better manage our senior staff members. Senior staff often feels as if they know how the process works based on their experience but that is regularly not the case. When a problem occurs we will pull up the Process Resource Centers and, accompanied by the employee, track what was done. Invariably, we find that the problem was because a task was not correctly executed as illustrated in the Process Resource Center. Applying the steps defined in the Process Resource Centers becomes the corrective action. We are now using the Process Resource Center as a part of our regular department productivity review and planning meetings.



Point and click links are used for additional resources like:

- Segmented and full workflows
- Metrics, outcomes, key performance indicators, analytics, and dashboards
- Work instructions, methods and procedures
- Illustrations, videos, and reference materials
- Policies and definitions
- Links to applications, websites, and other resources as required

The Process Resource Centers also helps us in communications with personnel external to our department. This includes other Dallas ISD support staff and outside vendors and consultants. The Dallas ISD Information Technology department is undergoing a major modification to an application which touches our department. We used the Process Resource Center workflows to explain to the IT

department how we work and to help them understand how the application touches what we do. We are using the Process Resource Centers in a similar manner with vendors and consultants outside of the organization that want to provide services and solutions to us. Process Resource Centers provides an intuitive multidimensional view of how we administer SHARS and MAC. The views are segmented such that no one process flow is overwhelming to the user. The segmenting is structured so that it is simple to understand and, most of all makes sense. It illustrates SHARS and MAC administration end-to-end, but is segmented in a fashion that allows us to navigate to what we need, when we need it in the normal course of how we work. Within the process flows and on the accompanying menu, we have clickable-boxes and links. This enables us to easily and quickly retrieve whatever additional resources we need, like documents, reference materials, contacts etc., exactly when we need them.”

Question - What did you think of the development process?

Mr. Lewis: “The work involved with designing the Process Resource Center was somewhat intense but this is what was needed to thoroughly flush out the processes and necessary supporting resources. When you verbally try to describe a process to someone, you invariably will leave something out. And oftentimes, that something left out is very important. Add to this, verbal discussions often lead to confusion because of differing perceptions and interpretations from person to person. We’re all familiar with the exercise of putting 5 people in a line then whispering a statement to the first person and by the time the fifth person tells it to you it is something different. Going through the design effort enabled our team to better understand the level of communications required within and external to the department, to

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better understand the process, to eliminate duplication of effort, and better define handoffs. The Process

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managing the efficient use of our personnel resources and more effectively administer SHARS and MAC.”

Question: So in summary, would you rate this as a successful endeavor?

Mr. Lewis: “Yes! I consider this a very successful project that’s placed us in a position to build upon. But I need to address an aspect that was key to the success of this project and that is the importance of the managerial commitment behind the project and the ongoing use of the Process Resource Centers. Like

anything new, it is very important to have managerial support behind any change to the status quo of “we’ve always done it that way.” If my supervisors and I did not use this as a regular part of our doing business, it would fall to the wayside. By incorporating this tool we’ve changed our organization’s culture. We’ve also positioned our department with a clearly defined, foundational process framework with which we can now baseline performance and systematically analyze and implement improvements.”

About Process Delivery Systems

Process Delivery Systems is a business process management consulting firm. We help our clients improve their ability to deliver the value expected by their customers in a fashion that is sustainable and provides the return on investments sought after by their investors and stakeholders. We do this by helping our clients define, optimize, calibrate and manage their business processes to meet their key metrics, budgets and improve the alignment between operations and strategy.

The end-users’ ability to efficiently and effectively execute key business processes impacts the organization’s ability to meet its goals. We help improve the end users’ ability to quickly understand and correctly execute the organization’s key business processes with Process Resource Centers. Process Resource Centers are user-centric web sites that place critical procedural content at the fingertips of users in a very intuitive manner for use in the normal course of business.

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