bizagi

INNOVELOCITY

CASE STUDY

Regional group of healthcare consortium transforms complex capital approval process

Northwest Capital Planning of Healthcare Consortium

Industry:
Healthcare

Solutions:
Business Operations, Compliance

Location:
USA

The Northwest Regional Capital Planning group of a large American Healthcare Consortium wanted to automate their previously completely manual approval process in the hope of making the process less labor-intensive and reducing the time it took to gain approval on business cases. They had to share information over Excel spreadsheets, with multiple versions often in circulation and difficulty in compiling all documentation for each business case to attain the appropriate signatures. This frequently led to bottlenecks and a lack of visibility.

Working with implementation partner, InnoVelocity, the group structured the complex capital planning and approval process, with variable approval routes based on business rules. The approval time was significantly reduced by enabling executives to easily review and approve requests from within emails. E-forms were created to share data for reporting and eliminate data duplication. Authorization, reviews and documentation changes are all documented as part of an automated audit trail, with all attached documents automatically merged into a controlled PDF.

1 month to deliver first version

Half the cost of competitor products

"The Bizagi business process management software has allowed us to streamline our capital approval workflow that was previously a highly complex and time-consuming effort to administer, manage and monitor manually... it has allowed us to track capital projects on an ongoing basis as stakeholders complete their milestones and actions toward leadership approval."

Systems Coordinator,
Regional Capital Planning

Objectives

- Speed up cumbersome, manual capital review and approval process.

- Eliminate reliance on Excel spreadsheets and manual tasks.

- Enable proper document management and version control.

- Provide visibility of process and eliminate bottlenecks.

- Ensure compliance and consistent documented support.

Achievements

- Significantly sped up approval process with automation and document management.

- Increased visibility for approvals, reviews, documentation, and status.

- Standardized process to ensure the requirements are met for every request.

- Review and approval of requests sped up by ability to approve requests from within emails.

- Automated audit trail and merging of attached documents into controlled PDF.

- Centralized storage of files to eliminate duplication efforts by multiple departments.

Overview

Part of a health insurance and medical care consortium with over 9.5 million members, the Northwest Regional Capital Planning Group needed to optimize its capital approval process. Working with implementation partner, InnoVelocity, they deployed Bizagi's low-code platform to standardize the complex process, create e-forms for data sharing, centralize documents, and automate key steps in the process, including audit trails to ensure compliance and efficiency.

Challenge

The Northwest Regional Capital Planning Group were looking to overhaul their manual capital approval process, which was labour-intensive and challenging to manage. It relied heavily on Excel spreadsheets to track projects while redundancies in data requirements for projects and business cases meant additional effort.

The use of spreadsheets led to a lack of visibility and issues with version control and there was no recourse if a business case reached a bottleneck. It was time-consuming to gain approval in the processes comprised of over 30 steps, with manual business case authorization required while all documentation needed to be present for signatures and sign off. Paper copies of documentation still needed to be retained for future reference.

Solution

A number of potential technical solutions were investigated, including SharePoint, IBM BPM and BP Logix. However, Bizagi and their experienced implementation partner InnoVelocity were ultimately selected due to an existing enterprise-wide license for the healthcare consortium already in place with platform TRO certification achieved in 2015, along with a strong track record of automation success within the National Benefits Administration group.

They also found Bizagi easy-to-use; the wizard-based low-code process builder allowed the first working application to be delivered to production in one month, at less than half the comparable implementation cost.

The platform also provided powerful features for email approval, document generation, including dynamic cover page generation and merging of attachments into a single PDF, and automation of business process workflow.

The final automated workflow contained the following key elements:

- Dynamic routing.
- Standardized forms.
- Defined roles and responsibilities.
- Embedded authorization levels.

- Automated electronic signatures.
- Forms archival (requests, attachments, signatures).
- Reporting (Status, Monitor process flow, Dollars in pipeline, Trends: projects by location and type).
- Benchmarks for process improvement.
- Centralized storage of documents.

Results

InnoVelocity worked with Northwest Capital Planning to structure the complex planning and approval process into a business process workflow using Bizagi, with variable approval routes based on business rules, ensuring the correct process is always followed for every request.

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> **Systems Coordinator,** Regional Capital Planning

The review and approval time for requests has been significantly reduced thanks to the ability for executives to quickly and easily review and approve requests from within emails. Automated electronic forms (e-forms) reduce or negate the duplication of effort surrounding project initiation and business case development. E-forms can share data with other forms and provide data fields for reporting.

As a result, there is increased visibility within the business case process for approvals, reviews, documentation, and status. This visibility provides more efficient management of the process and keeps the workflow moving. The standardized process provides assurance that each step required in the process has been completed prior to escalation and that each signature is documented prior to presentation for funding.

Bizagi also provided an automated audit trail and automated merge of attached documents into a combined controlled PDF – creating an audit trial to ensure compliance and consistent documented support. Events such as authorizations, reviews, and documentation changes are documented and reportable. Required documentation can be uploaded into the workflow, maintained and archived with the business case, e-forms and authorization. Storage of files has been centralized to eliminate duplication efforts by multiple departments.

They delivered the first version of the solution to production in one month at less than half the cost of the alternative competitor products and have continued to continuously improve the application since 2017.