Optum's Solution to Simplify License and Certification for Medical Professionals

Gwen Bot, Manu Kant, Preston Meadows

Optum

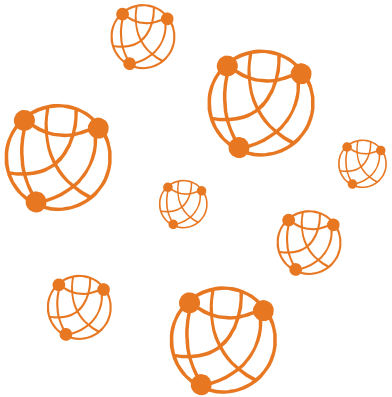
How ‘Well’ Gets Done – Optum’s Journey to Enterprise Clinical Licensure

Gwen Bot, Manu Kant, Preston Meadows

Optum

Agenda

Challenge



Execution

The Solution!

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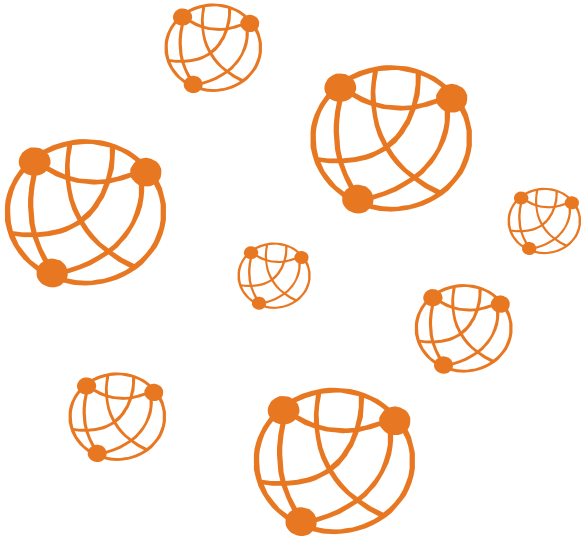
Challenge



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UnitedHealth Group

UnitedHealth Group is a distinctively diversified health and well-being company headquartered in the United States, and a leader worldwide in helping people live healthier lives and helping make the health system work better for everyone.

UnitedHealth Group serves clients and customers through two distinct platforms: UnitedHealthcare and Optum.

UnitedHealthcare provides health care coverage and benefits services.

Optum provides information and technology-enabled health services.

- 2018 revenues $226 billion
- Serving 139 million people residing in all 50 states and more than 130 other countries
- Processes approximately 1 trillion transactions annually
- Investing nearly $3.3 billion annually in technology and innovation
- Global workforce of 300,000, including 85,000 clinical professionals

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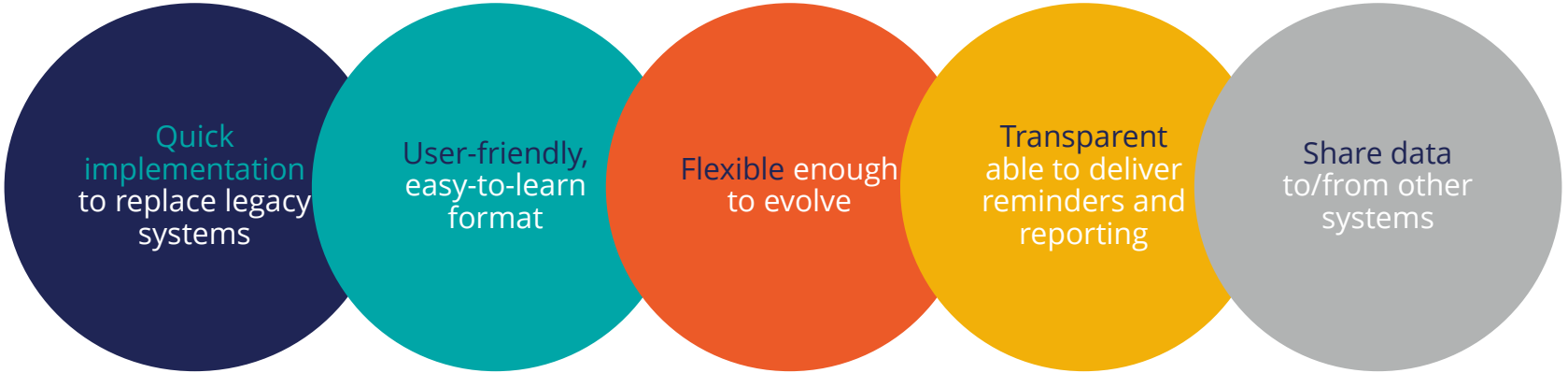
Business need

Goal:

Provide an enterprise solution for obtaining, maintaining and tracking individual clinician licensure

Requirements:



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Operational planning

Process documentation and updates

All processes reviewed, gaps filled, full team engagement to maintain

Team realignment

Understanding roles while matching and building skill sets to have the right people in the right roles

Change cycle management

Over communicate with daily users and prepare for changes with feedback loop

Customer feedback

Business Champions engaged in ad hoc, monthly and quarterly communications

Charge back model

System receipt and time tracking allows for accurate financial charge backs at the business unit level

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Execution

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Our journey with Pega

PEGA

UnitedHealthcare

OPTUM

2010	2011	2012	2013	2014	2015	2016	2017	2018

- Established a strategic customer relationship with Pega
- Instituted BPM Center of Excellence; launched BPM focused programs
- Evangelized BPM as a discipline across the enterprise
- Implemented 30+ programs with substantial ROI; supporting 50,000 user base
- Enterprise contract renewed with new products (mobile, product composer); doubled user base —100,000
- Optum / Pega partnership
- First commercial client, Optum / Pega engagement; adopted Optum modern delivery
- Begin robotics journey
- Digital Process Automation Journey

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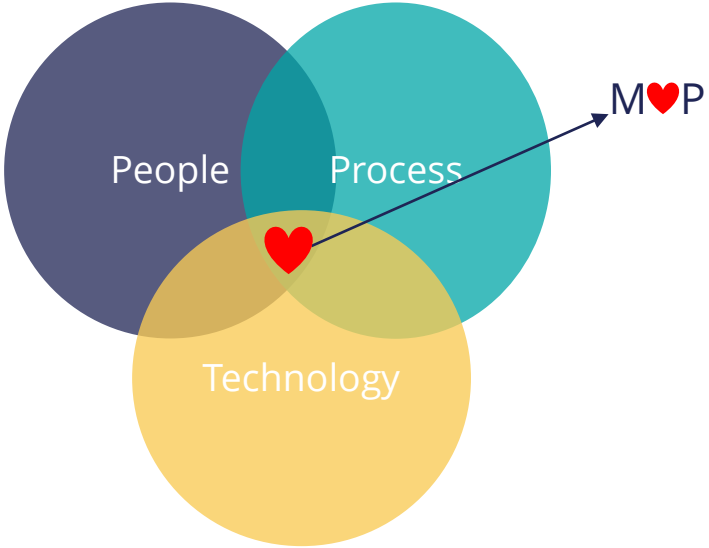
Design thinking



- Empathize
- Journey centric process
- Prototype using App Studio
- Test your ‘Theory’

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Preparing for the climb

- Right people (skills)
- Right process (Trainings & methodology)
- Right technology – Pega & DevOps Tools

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Right people

People

- Encourage curiosity, learn personality styles
- Technology skills

Co-location

- Whiteboard solutions
- Program Increment planning

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Right process

Training Title	Scrum Master	Product Owner	Solution Architect	System Analyst	IT Delivery PM	Development Team	Pega Lead Business Architect	Quality Assurance
100 Agile - Introduction to Agile Terminology and Concepts	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
101 Agile - Introduction to Agile at UHG/Optum	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
102 Agile - Writing User Stories	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
103 Agile -Product Owner Training	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
105 Agile - Scrum Master Training	REQUIRED	OPTIONAL	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
106 Agile -Agile Team Training	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
155 OSAM - Foundations	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
165 OSAM-Implementing OSAM	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
ICC - Install Manager Flowdock	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
Agile Practioner Flowdock Flow	REQUIRED	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL
107 CA Agile (Rally) Training	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED	REQUIRED
108 Agile- CA Agile (Rally) Tutorials	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL	OPTIONAL

Role trainings

- Product owner
- Business sponsor
- Rule authors (business delegated rules)
- Release Managers
- Scrum Master
- Release Train Engineers

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Right process

	Project Iteration	Sprint	High Level Sprint Topic	Testing	Release	Dependencies	Warranty	Licensure Team Actions
8/22/2016	PI1	S0	Infrastructure, Census File Feed, Initiate Data License Input Feature, Licensure Team View, Send License Feed to MPP					
8/29/2016								
9/5/2016		S0/S1						
9/12/2016		S1						
9/19/2016		S2						
9/26/2016								
10/3/2016		S3		Release 1 Testing				
10/10/2016								
10/17/2016		S4			Release 1 Production	Census Feed to PEGA		
10/24/2016								
10/31/2016		PI1 HIP	x					Licensure Team starts adding data to Pega
11/7/2016								
11/14/2016	PI2	S1	BIX, Initiate License Validation, Reporting, Manage Clinician Demographics, Ad Hoc Request, Case Search Clinician View, Clinical Manager View, BSL View, Licensure Manager View, Generic Webservice (Verify License), Technical Help Support Requests	PI1 UAT				
11/21/2016				Fix Issues			P1 Under Waranty	Continue to enter currently unsupported clinicians into PEGA
11/28/2016		S2			Release 2 Production	License Feed to MPP		
12/5/2016								
12/12/2016		S3				Start working on BIX		
12/19/2016								
12/26/2016		S4				NAS Drive for BIX		
1/2/2017								
1/9/2017		PI2 HIP	x			BIX Ready for Reporting Use		
1/16/2017								
1/23/2017	PI3	S1	New License Request (until Fulfillment), New License Request (Post Fulfillment), Clinician Job Status Event Management, Cancel Inprocess Requests, License Expiration Management (Renewal Notification), Additional WO Reporting, Update Business Need					
1/30/2017								
2/6/2017		S2		PI2 UAT		Start working on Feed to ICUE	P2 Under Waranty	
2/13/2017				Fix Issues				
2/20/2017		S3						
2/27/2017					Release 3 Production			
3/6/2017		S4						
3/13/2017								
3/20/2017		PI3 HIP	x	Regression Testing				
3/27/2017								

Operational

- Process walkthrough
- Understanding hand-offs
- Prototyping with App Studio

Grooming

- Write, review and rewrite
- Decrease ambiguity

Understanding big picture

- Road-map features

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Right technology

Technology ecosystem for our success!

- Tools for transparency in execution, measuring velocity
- Tools for deployment automation
- Tools for developing quality assurance automation
- Tools for executing test cases unattended
- Tools for service management

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Empowering business

Business Configurability

- Business Rules Management
  - Developed on Pega platform.
  - Automates code promotion & back promotion

- Production Environment Configurability
  - Manage certain rules in production
  - Does not require traditional code push
  - Changes immediately reflected in production environment

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Organic evolution

Aligning business architect role with operations

- Financial Impact
  - Moving from capital to operational expense
  - Capital funds go further

- Quality Impact
  - Business architect closer to operational processes ensures better adherence to business needs
  - Reduction in ‘lost in translation’

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The solution

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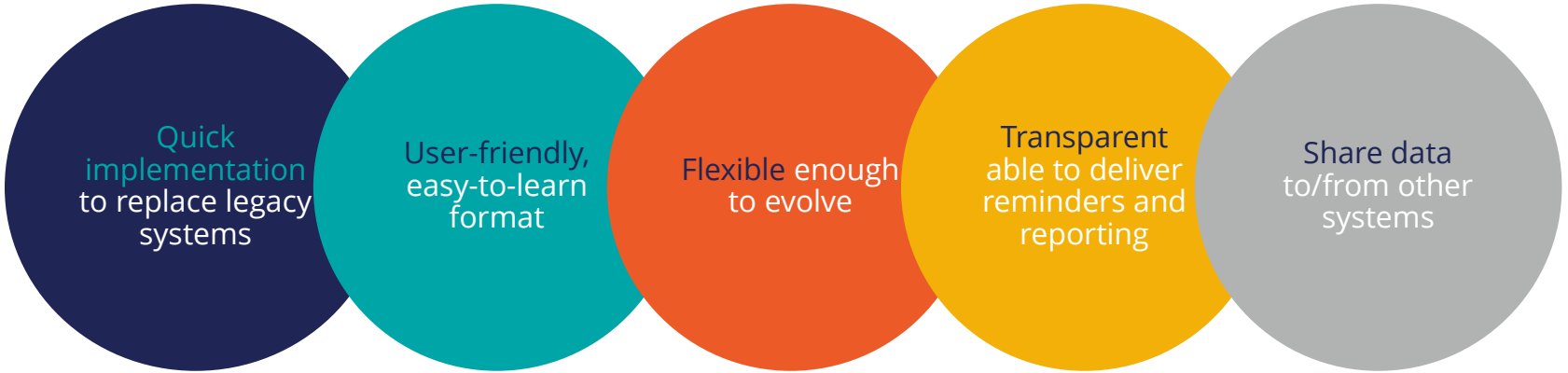
Defining the solution



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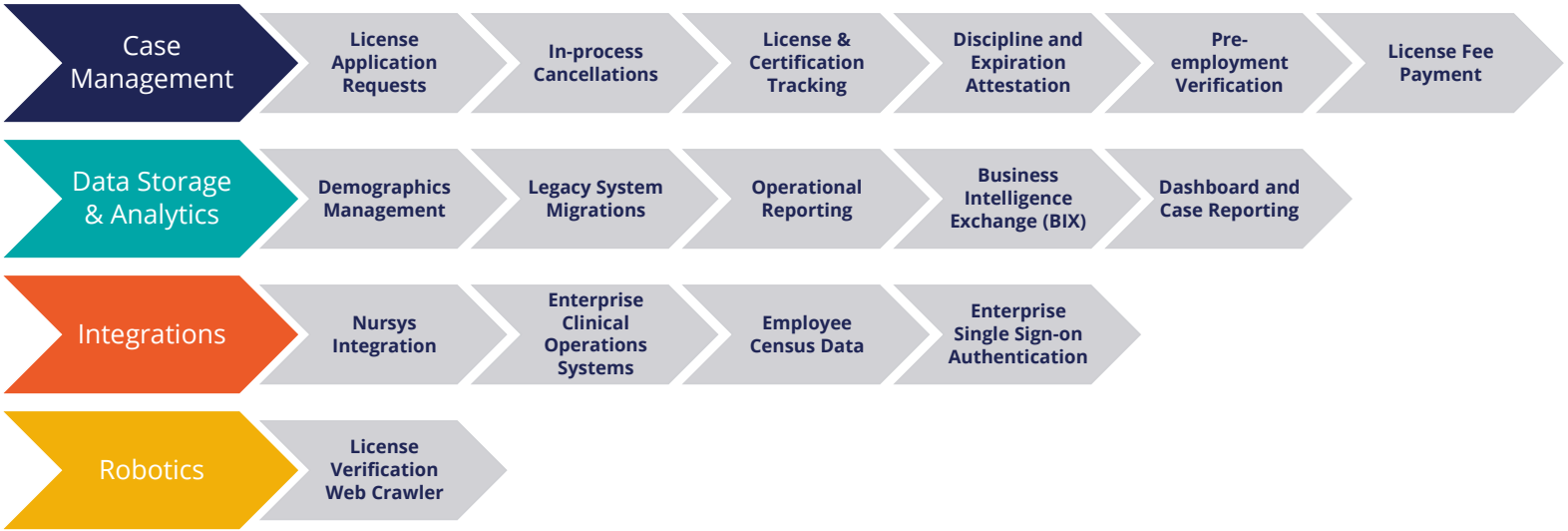
Defining the solution



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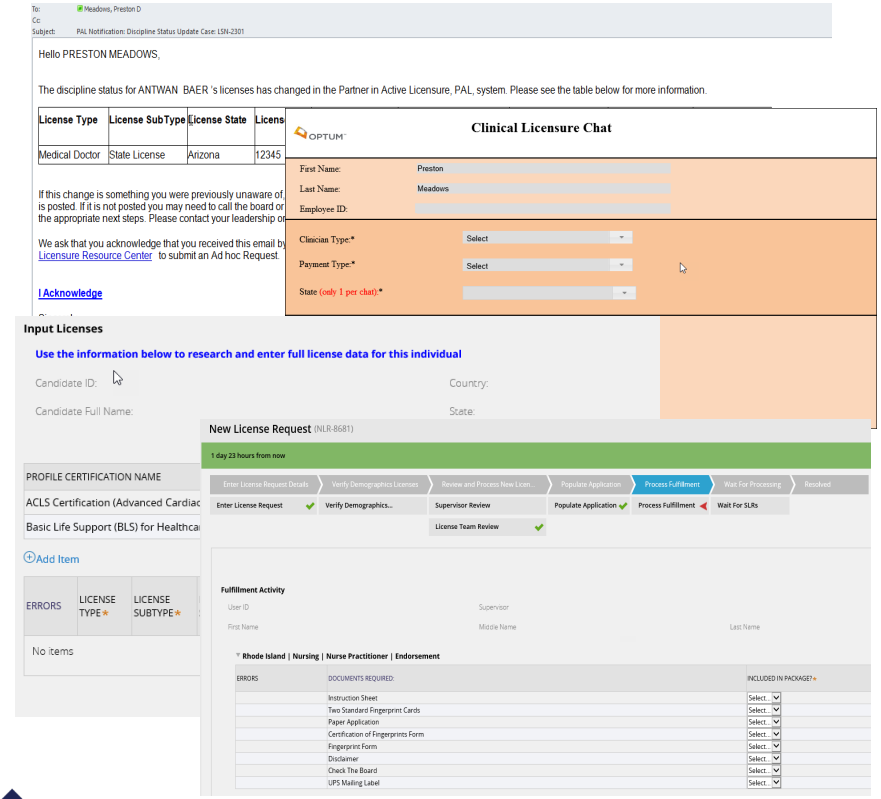
Case management



- License application requests
- In-process cancellations
- License & certification tracking
- Discipline and expiration attestation
- Pre-employment verification
- Payment tracking & receipt association

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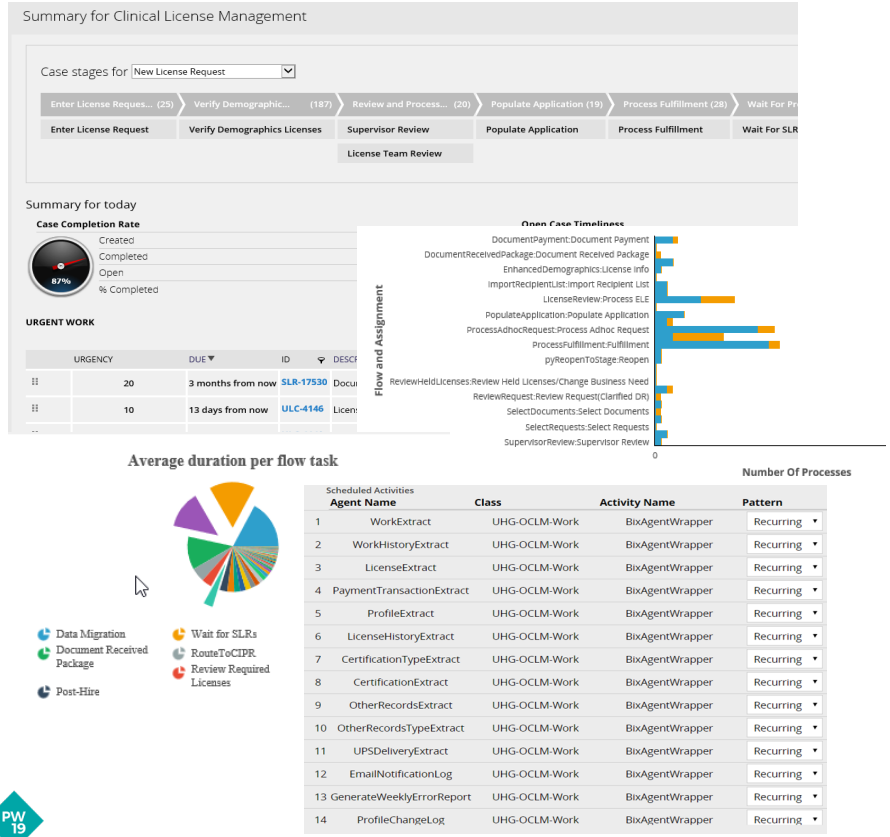
Data storage & analytics



- Demographics management
- Legacy system migrations
- Operational reporting
- Dashboard and case reporting
- Deep analytics using Pega

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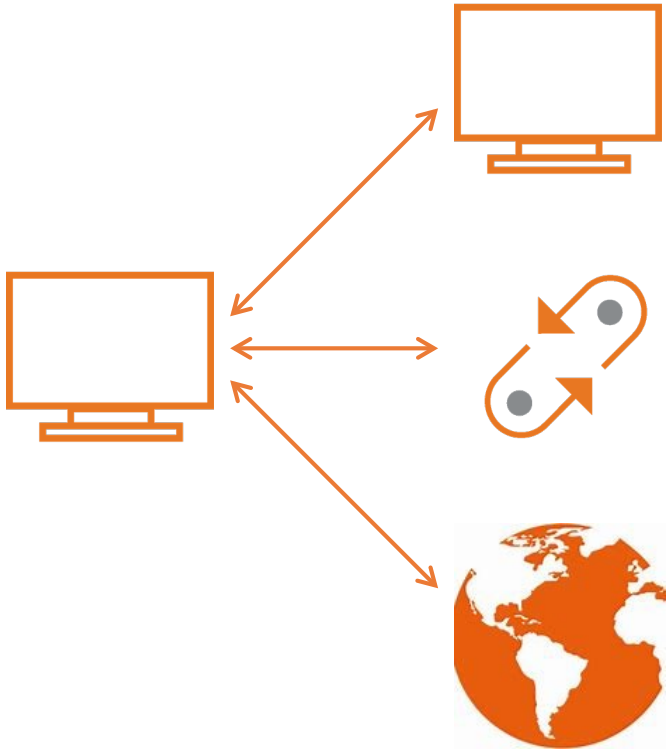
Integrations and robotics



- Nursys integration (multi-thread)
- Enterprise clinical operations systems
- Employee census data
- Enterprise security
- License verification automation

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Case study – Pre-employment verification

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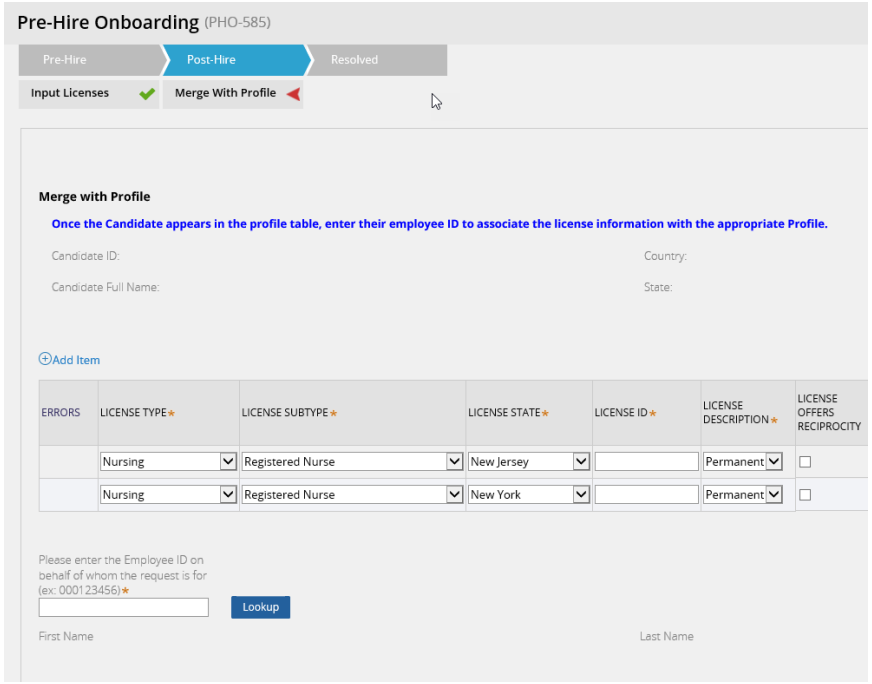
Pre-employment verification



- Partnered with HR
- Create cases to investigate candidates
- Store temporary license data
- Reconciles census data
- Consolidate primary source verification
- Informs manager upon hire

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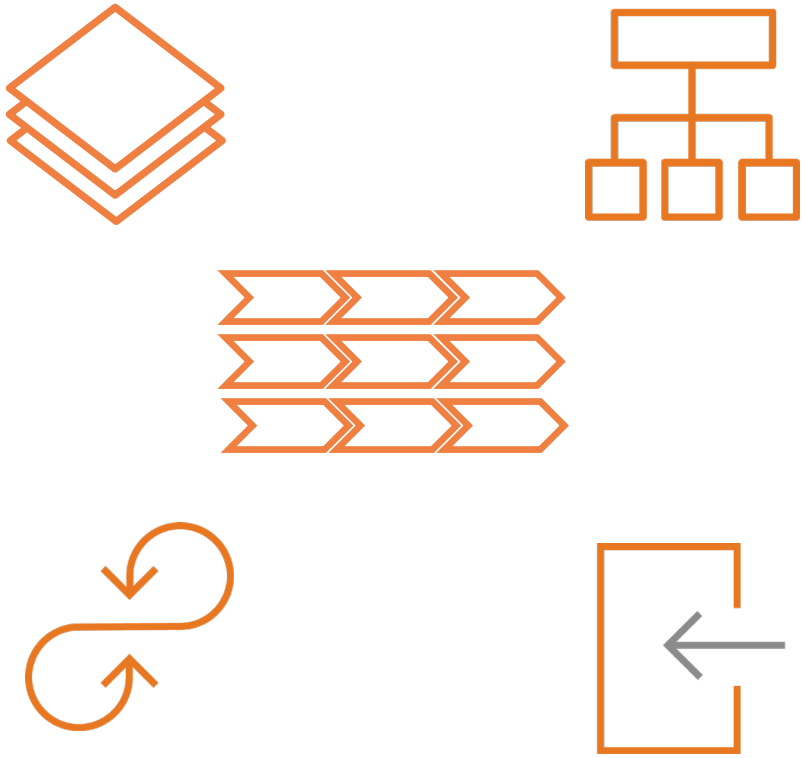
Leveraged components



- Situational layer cake
- Rules delegation
- Declarative rules
- Reusable assets
- Journey-centric rapid delivery
- Pega App Studio (Prototyping)

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Q&A

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Build for Change®