

Eligibility Determination

Client's Background

Customer is a public body which falls under health and human services. One of the functional area of this body comprises of services related to Medicaid, Food Stamps, Temporary Assistance etc.

Customer is involved and responsible for maintaining a budget for each program and determining a eligibility of each consumer based on different criteria's.

Client's Challenge

Customer has multiple geographical and functional departments with different set of people located at different locations and different people have different responsibilities and authorizes. Earlier customer had no centralized system in place to perform different activities. Most of the work was completed based on the paper work. This information has to exchange between customer, service provider and end consumer at different stages of the event.

A definite budget is allocated to customer for each program against a specific period. Customer had to monitor the utilization of each program against the budget. There are lot of rules defined for eligibility of an applicant for different services belonging to different programs. Information is captured and stored in paper form or in the form of excel file at different locations by different authorities.

Based on the above information customer was facing following challenges.

- 1) Quick and easy data access anywhere to customer and service provides to enhance the service planning and service delivery to end consumer.
- 2) Secured access to data customer users based on location and programs.
- 3) Reduce and finally irradiate the fraudulent claims for services.
- 4) Efficiency in tracking the utilization of budget for each program.

As most of the information is captured in the form of paper document and excel file it is difficult to consolidate the same and also it is time consuming because information from different locations has to be consolidated.

- 5) Reducing the overall time spend on determining the eligibility of applicant for different programs.
- 6) Improving the productivity and responsiveness of the organization staff.

The Our Approach

We performed the analysis of the current system to identify the problem areas, scope of the functional area. Based on these facts we proposed the MS Dynamics XRM as the platform for the core system.

MS Dynamics XRM is a robust, highly extensible Microsoft product which offers lot of out of box features to design and deliver customized solution.

We have four years of experience on designing and customizing solutions on top of MS Dynamics XRM. We have a pool of resources which can deliver cutting edge solution on top of MS Dynamics XRM platform.

Successful outcomes and results

We addressed following pain areas for the customer.

- 1) The new system will enabled the organization staff and providers to perform their work in their functional area from a central repository using a modern web browser from any location where a high speed internet connection and a computer is available.
- 2) Security model implemented made sure that only relevant data is accessible, modifiable to each user of the system. Security model can be configured as and when needed.
- 3) As all the provider service history and end consumer availed services history is available in the common system, system helps determining duplicate claims. The same consumer cannot be recorded in the system multiple times and then availing the multiple services and such scenarios are avoided.
- 4) Authorized user can easily monitor the utilization of the program against the budget. A user can identify underutilized vs over utilized programs. As all the

data is stored in central repository a user can see these details at any point of time. System can be configured to either warn or stop the user when program is over utilized by exceeding the budget. System generates the alert to respective authorities to take appropriate decision.

- 5) Rule engine is designed to determine the eligibility of applicant. This engine is capable of determining the eligibility for different services of different programs based on the applicant's information such as family income, current benefits etc. Once the applicant's information is captured within the system, eligibility determination is just one click away which saves end users huge amount of time.
- 6) As now centralized system is in place and access to data can be given based on requirement, the overall process of decision making and closing the activity is improved. As the staff can easily lookup the data into the system rather than finding the paper documents or requesting documents from different location, the productivity and responsiveness of the staff is improved.

Technology used

- MS Dynamics