

PEGA IMPLEMENTATION CASE STUDY #4

RETIREE DRUG SUBSIDY PROGRAM

Situation Title I of the Medicare Prescription Drug, Improvement and Modernization Act of 2003 contains provisions governing the special Retiree Drug Subsidies and other options that are designed to encourage employers and unions to continue providing high quality prescription drug coverage to their retirees. As part of this program, RDS Plan Sponsors have the right to appeal various types of RDS Program determinations. This involves a complex appeals process, which is driven by Pega.

Challenges The number of automated notifications required from the system and the sophistication required to build the correspondence processes were very complicated. The system also required complex application processing and approval/rejection processes that required integration with 3rd party and legacy systems. This highly visible, mission-critical application had a very aggressive implementation timeframe as well.

Solution Visual Connections, as a subcontractor to GDIT, implemented a sophisticated appeals process-to-process, first-level reconsiderations and reopening application utilizing the case management capabilities in Pega and its rule based business process engineering. This process is capable of intake through multiple channels and interacts with other subsystems to move the related work to their appropriate state as a result of the appeal that has been initiated. The system then applies a series of pre-defined rules to the appeal as well as its associated components before being routed to appeal auditors and managers for a final multi-level adjudication.

Results Features of the finished system include:

- Customer Support Portal using the CPM framework
- Sophisticated customer service flows to provide maximum efficiency
- 12 service types to accommodate a variety of service requests
- Automated notification service and email request/accept service
- Routing and escalation
- Plan sponsor registration and validation
- User registration and validation
- Unified identity management system
- Payment system
- Complex screens to mimic what the external application (java) users see; complex reports; and a reporting process
- Various offline job processes, such as automated email reminder generation, notification to other sub systems, and monitoring and generation of report work baskets and work list content.

During this period, our team was involved in a number of successful Pega upgrade efforts in order to keep current with the latest technology and functionality.

Relevance to UPIC Case Management

- Over 12,000 custom rules
- Processed over 3 million cases to date
- Processed 30-40K appeals