

# PacifiCare Health Systems

Cypress, California

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## Client

PacifiCare Health Systems is one of the nation's largest managed health care providers. The company serves employer groups and Medicare beneficiaries in nine states and Guam with a total of approximately four million members. Other specialty operations include behavioral health services, life and health insurance, dental and vision services, pharmacy benefit management, and Medicare+Choice services. PacifiCare currently employs over 58,000 people and has one document-processing center.

## Problem Statement

PacifiCare lacked the necessary information technology procedures to efficiently track documents from the print center through the client mailing process. Also, around 80 percent of PacifiCare's employees were temporary, and therefore the company needed more workers to fully comprehend the document process.

## Scope-Of-Work

Tompkins Associates created a document center control plan and provided strategies and training for successful implementation of the new document center.

For the document center control plan, Tompkins:

- Recommended methodology to track and control printed materials received from the print center to a temporary storage location
- Recommended procedures to transfer work in progress from shift-to-shift or back to a temporary storage location
- Provided a detailed drawing of the two work areas pertaining to storage and work location identification
- Met with the PacifiCare management and hourly personnel directly involved in the document process
- Recommended a list of additional equipment and materials that might be required to implement the training plan

To ensure implementation and complete training, Tompkins:

- Created a training plan describing each employee's role in document control
- Recommended group training with document control for all personnel involved in document processing

- Advised PacifiCare to use hands-on implementation of the document control plan

### **Results**

With Tompkins assistance, PacifiCare was able to implement a Microsoft Access-based work dispatch routing system that issues a manual document control log tracking all document movement. PacifiCare also made physical layout changes and installed new secured storage equipment for checks and check vouchers.

Overall, PacifiCare improved its customer service and now has the potential to improve its productivity by eliminating search time for lost documents.