RLDatix

A Contracting Process Renovated

RLDatix's Contract Management Increases Productivity and Improves Contract Completion, Quality and Cycle Time for Blue Shield of California

Blue Shield of California (BSCA) is a nonprofit health plan founded in 1939, headquartered in San Francisco and is an independent member of the Blue Cross Blue Shield Association.

Blue Shield of California needed a centralized contract management system that could customize documents, streamline workflow and reduce its excess of in-process document inventory in order to support the organization's need for custom contracts.

Blue Shield of California chose RLDatix's Contract Management, internally renamed ConDocs, a browser-based, contract lifecycle management (CLM) solution that offered customizable templates, intuitive user interfaces, workflow managed process control and one-click document creation.

BENEFITS

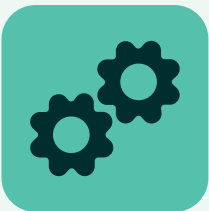**Established Clause portfolio**

Increased custom contract production

Reduced document inventory from 1,500 to 150

Reduced document creation time from weeks to days

Improved tracking and reporting

Improved contract finalization and distribution

CASE STUDY: BLUE SHIELD OF CALIFORNIA

With the organization's growing member base, BSCA needed a better way to consistently create, manage, and store post-sale artifacts for its members. A few specific challenges were highlighted that had negative effects on productivity and time management:

- Constant changes to various versions yielded inconsistencies and inaccuracies in document management.

- Contract fulfillment to customized groups required mostly manual entry of group-specific content to the contracts.

- More than 100 templates required manual customization for production, and completed contracts were stored in non-centralized locations.

- As member groups increased, contract inventory piled up and contract managers were having difficulty keeping up.

BSCA concluded it needed an enterprise contract management system that would solve for inconsistency and inaccuracy and eliminate redundancies in document creation while positioning them to handle growing contract requirements in the future.

RLDatix's deep track record of serving other large, complex healthcare organizations, its diverse client portfolio, and positive reputation with long term customers made the vendor selection process easier for BSCA. **"The company's experience with complex contracting processes, competitive pricing, and rapid implementation timeline in their proposal made them the obvious choice,"** said Kunal Dharia, project manager for BSCA. Differentiated advantages over other proposals included their system's inventory, trend, and ad hoc query reports, and its customizable dashboard for improved tracking and reporting.

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About Blue Shield of California

- **4 million members**
- **6,800 employees**
- **$13 billion in annual revenue**

Provides: Health, dental, vision, Medicaid and Medicare healthcare service plans in California.

Mission: To ensure all Californians have access to high-quality care at an affordable price.

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SOLUTION

CASE STUDY: BLUE SHIELD OF CALIFORNIA

An initial pilot followed by dedicated and flexible implementation

After RLDatix and BSCA teamed closely defined all the system's requirements, RLDatix configured a pilot domain that was introduced to the organization's contract management user base. As contract needs evolved over the following months, RLDatix made configuration adjustments through multiple iterations to account for changing industry regulations and internal processes.

Dharia describes the development and installation process of BSCA 'ConDocs' as a team effort on behalf of both BSCA and RLDatix. As subsequent business process configuration and new functionality were introduced, the system provided greater value, and broader and easier user adoption. **"The more we did, the more we learned, and the better we got at identifying all the functionality we needed in the system,"** said Dharia.

Multiple departments were going to use the system, so BSACA needed to establish clear policy and system development lifecycle discipline with its user base for the system to be used effectively and achieve its full potential. Dharia notes **"as we realized numerous opportunities to improve and expand the initial solution, they [RLDatix] would work with our team to implement them "they were a very good partner"RLDatix's Contract Management solution (BSCA relabeled "ConDocs") was initially implemented in 2014, with numerous innovations in business process made over time. By December 2015, the system was fully implemented across multiple user groups. "[RLDatix] had supported our need for changes as we went along,"** said Michael Antonini, Product and Marketing Operations Manager for the Core and Custom team of BSCA. **"They were understanding and flexible and came with the right attitude and intent to help us and make our system more successful."**

Antonini adds **"[RLDatix] took the time to understand the contracting business process that we go through to create our documents and that helped our team get our system aligned with evolving contracting practices, using [RLDatix's] Contract Management native features plus unique features developed for Blue Shield of California."**

Today, thousands of contracts are managed in ConDocs and more than 150 people use the system to generate contracts and produce customer-facing documents.

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>
> **Michael Antonini**
> Product and Marketing

Reduce document inventory and reduce document creation time

Antonini reports he has been able to reduce his contract inventory from 1500 to 150 documents, which has allowed his team to better track document modifications while extending ConDocs directed workflow through other departments and incorporating new users into the system. Prior to ConDocs, document creation would take two to three weeks but now, Antonini says, it can be done within 24-48 hours. **"It's transformed the way we do our work,"** he

Established language library for document production

With multiple work streams using the same language, ConDocs pulls documents directly from 16 Portfolio Representative Bases, a series of contract templates, for production. Because ConDocs is a centralized source of contract language units and document metadata, documents are easily searchable and retrievable.

Increased production

With ConDocs, the Custom Contracts team's current inventory is 258 documents, which is a record low, despite a net increase of 85 groups since July 2016. In addition, the Custom Contracts team completed a record of 90 documents in just one day and reduced the outstanding inventory by 330 documents in six business days. ConDocs has reduced the team's effort and time to generate and customize documents, which increased production and decreased in-process inventory. Finally, the system's user interface allows for faster training of new users.

Improved finalization and distribution

Prior to using ConDocs, all contracts and booklets had to be manually converted to PDF files and there was a two-step process for emailing and uploading documents into Spark, BSCA's business integration tool. Following implementation, teams could easily generate document packages to streamline document consolidation and filing. ConDocs provides for a one-step process for emailing and storing communication.

BSCA recently added metrics, subtasks, in-depth search functionality, bulk copy of existing records, and cycle change trackers to ConDocs. Doing so saved analysts time composing contracts because features were automated and integrated with other platforms, including its salesforce tool. The organization also added live order group links, radio button defaults, out of state mandate options, read-only profiles, and complexity drop-down menu options.

RESULTS

CONCLUSION

During a challenging time of enormous regulation and staff changes, Blue Shield of California's contract management community and RLDatix delivered significant innovation to the organization. RLDatix's flexibility and feature-rich seamlessly adapted to the organization's influx of changes, new requirements and requests, delivering a custom program that drastically improved the team's contract creation, amendment, and version control processes.

"Before we were guessing; now we don't have to guess anymore," concludes Antonini. **"Before, contracts and teams were siloed to individual projects and tasks. With ConDocs in place, day-to-day operations are executed in a more holistic fashion,"** notes Dayna Bryant, senior business analyst for ConDocs.

Today, BSCA more efficiently produces a far greater volume of customer contracts, tracks contract inventories, and better manages changes, keeping member agreements organized and internal teams aligned. As BSCA grows, ConDocs and RLDatix are now ready to meet any contracting challenge.

Ask a member of our staff for more details

RLDatix

Trusted by over 6,000 healthcare organizations globally, RLDatix helps to make healthcare a safer, better experience for physicians, staff, and patients alike. We offer a broad suite of enterprise solutions and services that enable the proactive identification of risk, enhance operational efficiency and compliance, and build a consistent, transparent culture of safety.   We partner with health systems to improve and integrate siloed governance, risk and compliance functions to keep their organizations safer. By increasing insights and collaboration across all healthcare operations — we enable healthcare organizations to save time, lower costs, and inspire trust.

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