

Claims Intake & Workflow (CI&W) Learning Labs Program

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Introduction

The Claims Intake & Workflow process, referred to as CI&W, is a new interface system at a major health insurance corporation that uses both manual and Automated Intelligence (AI) to process healthcare claims. The goal of this program is to set up Learning Labs, or a sequenced series of training videos that demonstrate how to process a claim using the new interface. The videos will consist of 3–5-minute video simulations that instruct the learner on the proper steps to finalize a claim using the new interface. The videos will be laid out in a journey that takes the learner from simple to more complex system processes providing the opportunity for the learner to apply what is learned to the work that they do.

Context

The Learning Labs will benefit the organization by preparing claims examiners/processors for the changes coming with the new interface. The goal is to establish a unified workflow that will enable a smooth transition from a mainframe claims intake system to a graphical user interface system resulting in the least amount of disruption of claims processing. The delivery of the Learning Labs is self-paced so that individuals can work through the videos as slowly or quickly as needed with the ability to rewatch videos to refresh skills on any forgotten pieces of the workflow. The format also allows examiners/processors to view the videos during breaks or with minimal disruption to their regular work schedules.

Building Support & Identifying Needs

Support for the Learning Labs was established through the department Leadership and Learning Governance Board, who approves all programs and courses being built. Because the Learning Labs are

partly being created to address the financial implications of mishandling health insurance claims, support for identified areas needing worker upskill or reskill is unanimously embraced and approved. Collaborating with Subject Matter Experts (SMEs) in the processes implemented in the design work is key to successful design methodology.

Needs are determined through the copious amounts of metrics gathered on the work of the claims examiners who are the target audience for the learning labs as well as potential system errors. This data is collected daily, weekly, and monthly and can be downloaded into worksheet files and pivoted to determine what the issues are, how they happened, and the manager team and associates who committed the error. This drill down is especially critical due to the immense scrutiny of the outside Blue Cross Blue Shield association monitoring and to satisfy state and local government guidelines of accountability.

Identifying Barriers to Learning

The main barrier to learning is pulling claims examiners away from their work to reskill or upskill. Workers are evaluated on a processing quota making it difficult to take them away from work responsibilities to train. Even mandatory training must be completed on their own time; therefore, the Learning Lab training will be built in small segments of 2-3 minutes each so examiners can complete them at their own pace while on breaks or between projects.

Managers do not consistently inform their associate examiners of updated processes and procedures. Time is usually the factor because managers are also under strict process time standards, and they do not have time to read all the communications that inform them of new upskill or reskilling resources. To help alleviate this burden, newly designed communications announcing learning labs will be sent separately from the other communications sent daily.

Program Goals and Objectives

The main program goal for individual states and regions is to achieve and maintain consistent satisfactory metric scores of 93% and higher, on claims processing time and accuracy.

This will be accomplished by:

- Properly using all system tools to finalize claims.
- Participating in the virtual live and/or self-paced training available to all claim's examiners.
- Participating in reskilling or upskilling as needed to properly finalize claims accurately and in a timely manner.

Instructional Strategies

Virtual Instructor Led Training (VILT), Virtual Guided Training (VGT) or eLearning, and eCast or videos, both interactive and passive, will include reskilling or upskilling content that provides instruction on how to process claims accurately and how to include changes that have been implemented or integrated into the claims processing systems and interfaces. These will be known as learning labs and will be available on demand as 2–5-minute resources that are stored in the Knowledge Library. The outcomes of Learning Labs will be improvement of quick access to on-the-job resources to achieve consistent accuracy and time involved in finalizing claims.

The system instruction will be focused on improving accuracy while using:

- The Claims Intake and Workflow (CI&W) interface
- The WGS system transfer to CI&W
- FileNet Image Viewer

Specific learning content needed will be determined through evaluation of data reports specifying the types of reoccurring errors that impact accuracy and performance scores.

Learning objectives

- Participants will view appropriate learning labs that demonstrate how to accurately use the CI&W to key, rekey, resolve, and finalize claims with 93% accuracy.
- Participants will be able to use various search functions to find the information in CI&W needed to accurately finalize a claim.

Learning Outline

Learner prerequisite: Learners will be proficient using WGS Mainframe and FileNet Image

Viewer and the Claims Intake & Workflow (CI&W.)

| Learning Objective | Content Description |
|--|--|
| <p>Participants will view appropriate learning labs that demonstrate how to accurately use the CI&W to key, rekey, resolve, and finalize claims with 93% accuracy.</p> | <p>The content will provide demonstrations in an interactive video format. In the video, learners will view a demonstration of keying and rekeying claims, resolving claims, and finalizing claims, then interact with the video to perform the tasks that were just demonstrated. The video will provide hints and guidance to the learner if needed.</p> <p>Instructional resources will be available for download for each video. Each video will be 2-3 minutes in length.</p> |
| <p>Participants will be able to use various search functions to find the information in CI&W needed to accurately finalize a claim.</p> | <p>Participants will view and interact with video demonstrations showing how to use the search functions in CI&W. Participants will be given a scenario in which they will need to find the appropriate ID number to search</p> |

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|--|--|
| | <p>for claim documentation. The demo will highlight finding ID numbers necessary in CI&W to locate claim documentation in FileNet Image Viewer. Each video will be 2-3 minutes in length. The video Learning Lab will be complete when the participant has viewed and interacted will all the videos in each subject area.</p> |
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Content Format and Post Learning Support

The format will be a virtual eLearning video that is housed on the Knowledge Library Learning Labs page. Virtual office hours will be held weekly as an MS Teams meeting to answer questions and troubleshoot issues. Managers and Supervisors are responsible for supporting associates for time spent participating in the learning labs.

Knowledge Transfer

The opportunities for knowledge transfer will occur within each learning lab by providing guided interactive practice for the participant. Knowledge transfer will be determined using pre-course analytics, the performance and accuracy of individual participants before interacting with the learning labs, and post-course analytics after participants complete the learning labs. Managers and Supervisors will check in with claims examiners during weekly 1 on 1 reviews to look at performance scores and determine if the claims examiner is on track to meet the desired metrics and if upskilling or reskilling is needed. The desired outcome of the learning labs is claims examiners meeting the 93% accuracy and timeliness expectation when finalizing claims.

Evaluation Plan

Prior to enterprise roll-out each learning lab will have a pilot run by gathering random claims examiner volunteers to view the 2–3-minute videos and provide feedback as a formative evaluation. A post participation survey will be sent out 14 days after the learning labs have been completed to determine if participants feel the training improved their on-the-job performance.

Budget

Learning and development (L&D) budgets are determined by each department. Each department has its own cost center from which funds can be extracted to use for hiring their own L&D content developers and trainers or the department can use content creators and trainers from other areas of the company to do the work of creating and launching learning labs. Annual salaries range from \$60,000/year for trainers and up to \$120,000/year for course creators, content developers and learning consultants. These L&D professionals work on several projects a year that vary in scope and length. For some projects return on investment (ROI) influences the development and delivery of training.

Marketing Plan

Marketing of the learning labs will consist of special internal Learning Lab communications sent out to distribution lists that include companywide claims examiners, directors, and managers. The communications will be sent by the content developer after the course has been launched on the Knowledge Library platform and is ready for use.

Resources

Daffron, S.R. & Cafarella, R. S. (2021). Planning Programs for Adult Learners: A Practical Guide. Josey-Bass.