

## MEMO

To: Executive Committee, ABAG PLAN Corporation  
Fr: Brian Kirking, IT Director, ABAG *BK*  
Dt: July 22, 2010  
Re: History and Status of iVOS Implementation for ABAG PLAN Program

Requested Action: ABAG requests that the Executive Committee accept this report as fulfilling the terms of the item numbered 2 in the June 22<sup>nd</sup> letter from the office of the ABAG PLAN Corporation's general counsel.

Summary: The iVOS implementation is completed. When the administrative budget for the ABAG PLAN Program permits, ABAG IT staff will develop and introduce refinements to the deductible billing process. ABAG has not paid for the deductible billing module originally proposed, and AON has not invoiced ABAG for the module other than report customization. There is one outstanding invoice from AON for software licensing in the amount of \$51,150. The invoice has been received and is being processed pending the board's deliberation on this matter. We expect that a more efficient process for check printing will be part of forthcoming software maintenance/upgrades that are part of the contract with AON.

History and Status: iVOS has been in daily use since November 2009 and is working substantially well. Enhancements over the previous Riskmaster system such as document imaging, guest links, and integration of the grants program have been realized. We arrived at this point over the course of 18 months. Below is a narrative of the implementation process.

Implementation of the iVOS software package for ABAG PLAN began in January 2009. The previous Riskmaster system had been maintained in-house by ABAG staff. The new iVOS system would also be maintained in-house. This was decided very early on, during the review of proposals. In-house hosting of the system provides quicker response to problems and reduced hourly staff costs compared to AON personnel. Therefore, the first task was to install and configure a working iVOS system at ABAG.

Installation and configuration of the system went well, and a system was up and running by mid February 2009. The system consisted of (1) a new application server running the iVOS software and (2) PLAN's existing Oracle database server, which was also serving Riskmaster. Installation and configuration of the system was performed by ABAG staff (Ravindar Selvanayagam and Atti Williams).

Immediately a shortcoming was identified in iVOS. The email integration (known as Claim Mail) improperly formatted some outgoing messages and mistakenly discarded

some incoming messages. An “Issue-Action Log” was started to track the resolution of issues such as this. This log was reviewed weekly throughout 2009 in joint WebEx coordination meetings between ABAG and AON staff. A sample of the Issue-Action Log is attached.

The original contract with AON contains the following line items:

- Site License for Base iVOS Claims Administration System
- User License Fees (Full Access, Read-Only, and Guest Link Users)
- VOS Express Module (email and correspondence)
- Laser Check Printing
- Document Imaging (scanning of paper documents)
- Positive Pay Interface (to/from bank)
- PERI GL Interface
- Project Management
- Training
- Data Conversion
- Custom Interface to Oracle Financials
- Custom Development of Management Data Reports (MDR)
- Annual Software Maintenance (product updates/upgrades and customer support)

Subsequently two additional line items were added:

- Custom Deductible Billing Module
- Integration of PLAN’s Grant program within iVOS

As illustrated by the sample Issue-Action Log, every one of the line items required attention during the course of implementation. Nothing was a simple “plug and play” feature. Each item was discussed at length during the weekly coordination meetings, and ABAG and AON staff each took away a long list of action items from each meeting.

Data Conversion – from Riskmaster to iVOS – was a major focus during Spring 2009. Any conversion from one database structure to another is a major undertaking. Our conversion was especially complex because the Riskmaster system had been in use for more than 10 years. This meant that the Riskmaster database structure had evolved (not always in an ideal way) as the software matured. And there were numerous opportunities over the years for data to be entered in different ways. ABAG staff (primarily Fred Parkinson) worked closely with AON’s Data Conversion Specialist to execute the conversion.

Data conversion was a two step process – a trial conversion and a final conversion. The Riskmaster database was still being used daily, so a trial conversion was performed using a copy of the Riskmaster database. Scripts were written to convert Riskmaster to iVOS – including both the structure of the data and the data itself. The details of the scripts were modified to provide the precise conversion necessary in order to migrate historic data to

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iVOS. In parallel, elements of the existing data were “cleaned up” in order to make them more standardized and consistent. Similar to the Issue-Action Log for the overall project, a Conversion Issues Log was used to track resolution of problems encountered during the trial conversion. This log was discussed weekly.

The purpose of the trial conversion, the refinement of the scripts, and the cleaning up of Riskmaster data was to ensure that no unexpected problems were encountered during final conversion. New information was being entered daily, so the final conversion had to happen quickly. No information could be entered while the conversion was in process, or it would not be brought into the new iVOS system. The effort paid off, and a final conversion was performed successfully November 1-2, 2009. November 1 is referred to as the “go live date”.

Even as more and more of the data conversion issues were identified and resolved, work continued on other line items in the implementation process. Over the course of several months, ABAG and AON staff together completed installation and testing of items like Document Imaging (which allows invoices to be scanned and attached to claims within the system) and Positive Pay (which decreases the possibility of fraudulent checks). By the go live date in November, enough of the iVOS system/modules were tested and working that the software could be used daily by the examiners. Riskmaster was retired, and iVOS has been used exclusively since that time.

Some issues remained unresolved, however, and these were carried forward. ABAG and AON staff continued efforts to resolve these issues during 2010. Specifically:

- Reports
- Guest Links
- Laser Check Printing
- Custom Deductible Billing Module
- Integration of PLAN’s Grant program within iVOS

Reports are created using the built-in iVOS reporting module. An extensive catalog of report templates can be used as-is or customized for a user’s desired purpose. Although the reporting module is very flexible, customization is not user friendly. Therefore, it’s recommended that one PLAN staff member focus on report customization.

Guest links are a method of accessing iVOS claim information remotely from outside ABAG. Upon instruction from an authenticated user (typically a claims examiner), a link is generated by the iVOS system and sent in an email message. The link provides the email recipient with single-click access to the referenced iVOS claim file, even if the recipient is not an iVOS user. The recipient needs only an internet connection and browser. Access is restricted to one claim and is read-only.

The guest link feature did not work in the iVOS software version that was current when we went live. New versions were subsequently released, and in June 2010 we updated to version 4.3.2. The guest link feature is now available.

Check printing is a fundamental element of claims processing. Printing of checks from iVOS has been a challenge throughout the implementation process. Initially the challenge was getting the proper information on the check in the proper position and printing the proper batch of checks. Then, two weeks after going live, the check printing process simply stopped working. ABAG staff instituted a workaround, which involves manual intervention at three points in the printing sequence (“chain”). This workaround has been used for the past eight months. A fix for this problem is in AON’s development queue for a future release.

Deductible billing is performed by ABAG’s accounting staff. Our intention is that much of the deductible billing process be automated by utilizing functions of the iVOS software. This has been partially realized. AON began work on a deductible billing module, but never made significant progress. It was obvious they did not understand the nuances of various billing scenarios. Therefore, we instructed AON to stop work on this task and focus on other issues. AON provided a deductible billing report, which extracts key information from the iVOS database. ABAG staff (Charlene Harrington, Fred Parkinson, and Ravindar Selvanayagam) have refined this report to the point where it is now used as the monthly bill to members.

Extraction of information from iVOS via the deductible billing report facilitates the deductible billing process, but the current process involves more manual intervention than ideal. AON management says they are working on a comprehensive billing module for general distribution (probably as an extra-cost module), but they have not announced a release date. Consequently, we will continue using the current process for the foreseeable future. As time and resources allow, we plan to introduce additional automation into the process. For example, now that guest links are working, we hope to turn the claim numbers on the deductible billing reports into links. Members could then click the claim number to access the corresponding claim file, including scanned invoices. This will eliminate the need to copy and mail printed backup with the monthly bill.

Finally, member Grants for the risk management program have historically been processed and tracked using Excel spreadsheets. Grant checks have been issued from ABAG’s Oracle Financial system. While this system has worked fine, moving to a new claims management software platform provided an opportunity to move grants administration to the same platform. This has been accomplished. Grants are entered into iVOS in a way that’s similar to (but separate from) claims. Limits are tracked, checks are printed, and reports are generated within iVOS. Moving forward, this provides a consistent interface and a uniform location for both claims and grant information.