



## Protocol Global Solutions Case Study

# Enrollment Verification A Seamless, End-to-End, Multi-Step Solution

### CHALLENGE

- Health plans must comply with CMS requirements to verify new member enrollment in their plans via a multi step process within 15 calendar days of application date.

### SOLUTION

- Protocol Global Solutions has created a compliant, end to end solution for enrollment verification including outbound calling, letter fulfillment and a centralized reporting portal directly accessible by health plans for tracking and auditing.

### RESULTS

- Turn key, all encompassing process and systems with proven results.
- Secure, web based portal for plans to access verification attempts, recordings and status of all records - both completed and in progress.
- Single point of contact for easy management of the entire process.

To discover how Protocol can add value to your customer relationships, call 1-800-677-2001 or visit [www.protocolglobalsolutions.com](http://www.protocolglobalsolutions.com).



### The Challenge

When it comes to Medicare compliance, the regulations are clear: all new enrollment applications must be verified within 15 days. More importantly, these verifications must be meticulously tracked and made available for review by the Center for Medicare and Medicaid Services (CMS) upon request. Health plans were searching for a partner with the capability to handle the entire process - from the required three outbound telemarketing efforts, through letter fulfillment within the guidelines set forth. To add to the challenge all steps within the process must be date stamped showing a complete audit trail of all required activities. This audit trail must include not only capturing the response from each interaction, but in addition telephonic conversations must be digitally recorded for future access. All data elements need to be placed in a centralized table and indexed for easy access and retrieval.

### The Solution

In answer to the overwhelming requests from health plans to find a way to both facilitate and streamline the enrollment verification process, Protocol Global Solutions developed a true end-to-end solution. Daily files of all applications are received from the health plan and imported into Protocol's systems at which point the first outbound calling attempt is made that same day. All applicants that do not successfully complete verification on that initial outbound call are then transmitted to the fulfillment house where letters can be mailed as quickly as the following mail day. The call center team continues with the second and third attempt to applicants who have not been contacted. In addition to the outbound calling attempts, Protocol provides a team to answer any incoming requests generated by the letters. Since all data is centrally stored, the representatives can access the applicant's record to complete verification whenever they choose to call. All phone calls are digitally recorded and stored with the associated record for later access. To truly set the process apart from other providers Protocol built a custom, user friendly portal for Health Plans to quickly and securely access any record in near real time throughout any step of the process.

### The Result

Partnering with Protocol made a dramatic improvement in each health plan's ability to contact, complete, record, and recall enrollment verification information. Moreover, it streamlined the workflow within their businesses providing a fully inclusive solution and on demand access to the data that mattered. The bottom line: another valuable innovation achieved via partnership with Protocol Global Solutions.

### About Protocol Global Solutions

Protocol is your single source for contact center services focusing on customer service, lead generation, sales, customer acquisition and retention. With over 2,200 employees in 8 locations worldwide, we proactively add value to the relationships between our clients and their customers with depth and experience across a diverse range of verticals and services.

