



## DATA INTEGRATION CRITICAL TO HEALTH PLAN ACQUISITION



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### **Problem to Solve**

As anyone who has worked through a business acquisition can attest, the process is often difficult and time-consuming. Once an acquisition is finalized, the challenge becomes executing the integration and operational details efficiently, accurately and quickly enough to meet inevitable new financial goals.

That was the hurdle faced by a large, integrated health care system after it acquired a regional health plan. The health system needed to rapidly integrate the health plan's benefits data to meet its new business timing deadlines. Unsurprisingly, it quickly became apparent to all that this integration would not be a turnkey process.

When the health care system first developed its national operations a decade earlier, its benefits data was sourced from its regional operations. The newly acquired health plan was different, however, because its benefits data was sourced from the health plan's own legacy systems. Much was unknown about the health plan's data. What was known indicated that integrating the health plan's data would require complex transformations to bridge data gaps.

The health care system engaged Freed Associates (Freed) to develop solutions and deliver the acquired health plan's benefits data to its national operations. Freed was selected based on its prior



familiarity with the system and its experience in health data integration.

### **Strategy and Tactics**

The success of the health system's acquisition relied on Freed's ability to help correctly and effectively deliver the health plan's benefits data to its national operations. There also needed to be a seamless transition to the health system's operational team, which would be responsible for ongoing data processing and validation. A delay in data delivery could have postponed the health system's business plans, at great cost to the organization.

To accomplish these goals, Freed needed to:

- Acquire a detailed understanding of the health plan's legacy data characteristics and systems, and use this knowledge to select the best source system and data elements to meet national operations requirements
- Document detailed requirements, data transformations and mapping, including complex solutions, such as designing and implementing a new reference table involving 300,000 records, to address significant data gaps
- Leverage test data to write and test SQL UAT scripts, and identify missed/incorrect requirements, mapping and coding errors, so that developers could make corrections prior to UAT
- Produce an extensive user guide detailing information about all relevant data, processing and systems, including source data anomalies and limitations
- Allow ample time for knowledge transfer to, and training for, the operational team that would be responsible for ongoing production support

Given the disparate data in the source and target systems, Freed had to think outside the box to design solutions to bridge the gaps. For example, Freed analyzed numerous source data elements in the health plan's data warehouse, to identify those which could be combined and transformed to create system data elements. Freed also created large, complex lookup tables, and the logic for using them, to determine when system data should be created.

Throughout the project, Freed and the client team discovered multiple source data anomalies which was challenging to handle using a waterfall-based methodology. Because Freed did so much data exploration during development, the client's developers were able to respond to late requirement changes prior to UAT. Upon completing UAT, Freed was actively involved in historical load and production cutover, shadowing the operational team's validation of benefits data in production. After go-live, the operational team seamlessly supported production processing based on Freed's comprehensive documentation and training.

### **Results and Conclusion**



Through Freed's work, the benefits data was delivered from the acquired regional health plan to the health care system on-schedule and defect-free. This work will enable the system to expand its revenue opportunities in a new geographic region and enhance relationships with national employers relying on consistent and accurate benefits data.

While the health care system's plans to add a new health plan to its national operations were challenging due to the system's fixed timeline and many interdependent projects, Freed's facilitation, solutions, documentation and training were critical to the initiative's success. Acquisition hurdles are often more easily surmounted when working with an experienced guide.