**CASE STUDY:**

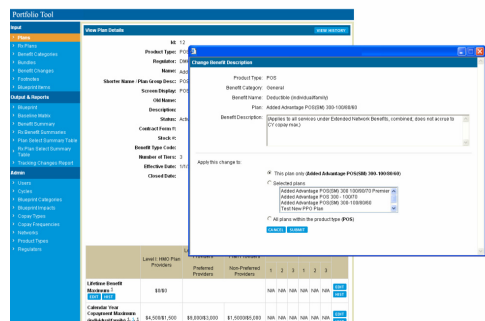# Creating Web solutions for Health Payers

**Portfolio Tool**
Centralized repository for tracking portfolio benefit/blueprint changes over time



## Challenge

Our client has identified a large business need within the Mid/Large Product & Marketing teams for a centralized repository to track portfolio benefit/blueprint changes over time and automate input of this information into matrices, blueprints and cycle benefits collateral.

This information was not stored in one place, and could only be found through reviewing email threads and multiple versions of Excel and MS Word documents.



## Our Solution

Pamet produced a clearly defined architecture, including the database design, and development plan for the solution.

Main features of the solution:

- Identifying and reporting on current benefits.

- Identifying, tracking, and reporting out on changes to benefits, footnotes, and other blueprint items.

- Creating outputs comparing benefits across multiple plans and across multiple benefits within one plan.

- Facilitating entering changes across multiple plans and creating new plans.

- Integration with Microsoft Word and Excel to automatically produce various product and marketing outputs.


- .NET
- MS SQL Server

## Benefits to the Client

- Increased efficiencies by the reduction of manual processes and the reduced need for stakeholder review of the benefits and footnotes entered into the cycle collateral.

- Eliminating the error prone process of maintaining email chains and various Excel and MS Word documents. Those were manually updated, one at the time, making it a very time consuming activity with great potential for user errors and omissions.

- Improved accuracy of the output data. The accuracy of the Matrices and Blueprint output are critical since benefit changes information they document are communicated out to regulators, producers, employers and members and at the same time define the rules for payment of claims.