Cloud Storage Streamlines Benefits Management for Advocate Health Care

ECMNOW!

EfficiencyNOW!
Spends 50-75% less time on benefit calculations

ControlNOW!
Improves accuracy of benefit calculations

MoneyNOW!
Provides benefits to 50,000 with just 4.5 staff members

What if you could provide benefits management for a staff of 35,000 with fewer than five employees? Think it can't be done?

Advocate Health Care uses ImageSilo to securely manage retirement and pension plan information for all their employees plus about 15,000 retirees. The cloud-based content management service creates so many efficiencies and so dramatically simplifies information control that they need only 4.5 staff to manage the retirement benefits process—far fewer than the industry-standard 1:100 HR ratio![1]

The Situation

Advocate Health Care was formed in January 1995 through the merger of Evangelical Health Systems Corporation and Lutheran General Health System. As the largest health organization in Illinois, Advocate Health Care serves more than 100,000 in-patients and 2,000,000 out-patients annually at more than 450 sites for care and 12 hospitals. Two of their hospitals are designated among the nation's 100 Top Hospitals.[2] It is a faith-based, not-for-profit health care system based in Downers Grove, IL.

Through the years, Advocate has grown through a series of mergers and acquisitions, which means that the benefits department has worked to combine and merge a wide variety of pension plans and other benefits. Today, they manage a wide variety of retirement and pension programs for about 35,000 employees and 15,000 retirees. When Benefit Specialist Susan Marseille started with Advocate, the records required to manage these programs were neatly filed away in the file room. As time went on, however, the file room began to overflow. "At first," she explained, "we rented external storage, but that quickly got very expensive and was inconvenient. It took time, and we paid a fee each time we needed to retrieve something. We knew we needed a better solution."

The benefits team receives 200-300 inquiries about pension and retirements benefits each month, and they provide about 1500 benefits calculations every year. When a call is received, the request goes through four steps: 1) record-keeping staff collect information from the requester, 2) benefits specialists perform the complex retirement calculations, 3) actuarial staff verifies the calculations, and 4) the information is provided back to the customer. In a paper-based filing system, this process took 8-10 weeks!

It was a problem destined to grow as Advocate continued to grow. Marseille began looking for a solution to convert paper files into an electronic system that would also provide simple keyword access to benefit information for the staff.

The Solution

To better manage office space and simplify access to information, Advocate chose to digitize records and manage electronic files in ImageSilo. Paper records are sent to Datamation, a Digitech Systems reseller, for scanning and upload to the cloud-based service. Today,

Advocate stores 350 GB of information online, and the information is structured in seven projects that include not only pension and retirement information, but also other HR records such as leave of absence, compliance and health and welfare.

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The conversion to digital information has simplified records management for Advocate's benefits department. They have faster access to records and better control of the data needed to calculate plan benefits. This enables Advocate to run a very lean benefits department.

When employees call for their retirement benefit calculation, Advocate can now deliver the entire packet in 30 days or less rather than the previous 8-10 weeks. The benefits specialists only need about 15 minutes to complete their calculations thanks to ImageSilo, which gives them instant access to plan information. An electronic workflow component automatically routes the request from the record keepers to the benefits specialists and actuaries and then to the customer. "ImageSilo has dramatically simplified the entire process. It's even improving relationships with other teams, like the actuaries and records staff, because we don't wait on each other for information anymore," commented Marseille.

> "ImageSilo puts everything at my fingertips. Within a few minutes, I can get people the information they need, and I can securely access it from anywhere. The system gives me peace of mind knowing nothing sits on my desk."
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> Susan Marseille, Benefits Specialist
> Advocate Health Care

With ImageSilo, information is not just easier to access; it's also easier to control. The digital process ensures that specialists work with the most current information and access the retirement plan information specific to the customer making the request, leading to more accurate calculations. "Accuracy is a top priority," explained Marseille. "Our calculations have to be accurate or the actuaries will call us on it. Our customers count on the information they receive from us to plan their lives, so we are passionate about getting it right."

Not only is the team saving money by providing accurate benefits for retirees, the simplicity of the system has allowed Advocate to control staffing costs as the organization has grown. If they were required to hire to the industry-standard 1 HR person per 100 employees, the team would cost the organization an estimated $24 million in additional annual salary.[3]

ImageSilo has even garnered the attention of the Advocate Health Care Green Team, a group within the company that recognizes efforts to build environmental sustainability into day-to-day work practices. In 2015, they awarded the Advocate benefits team an Environmental Stewardship Award for eliminating paper and saving resources across the team. Marseille commented, "We would never have been able to build our paperless processes without ImageSilo."

1 http://www.workforce.com/2000/03/28/idear-workforce-i-how-many-hr-pros-per-employee/
2 http://www.advocatehealth.com/overview-of-advocate
3 http://www.bls.gov/news.release/pdf/wkyeng.pdf

About Datamation Imaging Services

Since 1995, Datamation Imaging Services has provided document management consulting and imaging services for numerous clients in the Chicago area. Datamation has helped hundreds of businesses implement cost-effective, time-efficient document imaging solutions. They offer an array of imaging options, including document scanning, data entry, OCR, forms processing, workflow and online document management software, and backlog conversions of existing files. Datamation has been a Digitech Systems reseller since 2000, and they are a nine-time recipient of the Circle of Excellence award. To learn more about Datamation, visit www.datamationis.com or call 630-321-0601.