

# Keeping it Simple: Creating Customized Internal Reports



## Challenge

CAQH's application contained more information fields than the organization needed and flowed in a different order than internal data entry screens

"Manual work time has decreased, allowing the staff to be remobilized to handle other priorities. Focusing on required network specific fields will also assist with improving data integrity, including directories.

—Cathy Ferrara  
Manager of Professional Credentialing  
Blue Cross Blue Shield of Michigan

## Summary

In looking for a way to increase efficiency in its credentialing shop, BCBSM turned first to the staff doing the work. Staff weighed in on where processes could be streamlined and helped create tools to accomplish it. By focusing on what was most important, the shop was able to develop a process that resulted in improved turn-around times and significant postage/paper savings. Adapting the CAQH data extract to better meet its needs was key to realizing these benefits. Getting credentialing staff on board to help design the solution made for practical success.

## Best Practice Solution

**Use the UCD extract function to highlight key data in a concise report that matches the sequence of internal data entry questions**

### **Profile process streamlined, tasks reduced**

- ▶ Allows for ease of workflow for the report production task
- ▶ Page length was reduced because unnecessary data was omitted
- ▶ Increased font size makes the process more user friendly for credentialing staff
- ▶ Reorganized questions to allow for ease of data entry and increased accuracy

### **Next steps point to further efficiencies**

- ▶ Switch from legacy credentialing system to new system
- ▶ Pull directories and create more automation between systems with the UCD and other primary verification sources

## Results

- ▶ Customized report cuts between 15 to 18 pages per application
- ▶ Less searching for appropriate data led to improved turn-around time and less manual work time

## Key Takeaways

- ▶ Shorter profile developed with credentialing staff is more efficient
- ▶ If your goal is to save paper and time, look for ways to streamline amounts of data