

# BEYOND THE REPOSITORY

A guide to comprehensive content management for healthcare **payers**



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# Do you need a content services platform?

As a healthcare payer, you likely already have a document management system of some sort. However, chances are this legacy system is isolated to a few departments and hasn't been updated in a while. It could be the technology in use isn't even supported by the vendor anymore. Can you really trust this system to support your ongoing digitization demands and the dynamic needs of your members? Now more than ever, healthcare payers need a comprehensive enterprise content services platform that streamlines operations through automation, provides the low-code flexibility to quickly adapt to change and allows you to better support the needs of your member community. This is exactly what Hyland provides.

In this ebook, we'll walk through the three core differentiators between a content services platform and what may seem like comparable solutions, as well as provide a checklist for evaluating key content capabilities.



“ Why do we need a content services platform when we can store content in our [fill in the blank] business application?”

- Responsible IT Leaders

The question of whether a content management system for that matter, is necessary often comes up when your organization is considering investing in a modern enterprise application such as:

- Enterprise resource planning (ERP) applications
- Human resources information systems (HRIS)
- Customer relationship management (CRM) systems
- Healthcare information management (HIM) systems
- Financial services applications
- Insurance management systems

These applications are significant investments, and they often offer some lightweight file management capabilities. It's understandable that your team asks for due diligence to maximize the return on investment and reduce technology overlap.

# Reason No. 1:

Not all repositories are equal





Chances are, your new enterprise application wasn't designed with the primary purpose of storing content, and that function can't be treated as a secondary concern. It's important to evaluate the alternative repository against the needs of your organization. For example, how does it measure up to your needs for:

- **File formats** — Can the repository manage all necessary file formats, such as emails, PDFs, images, office documents, videos and other rich media files?
- **Batch uploads** — Can users scan or upload more than one document at a time into this repository?
- **Multi-user access** — Will everyone who needs access, inside and outside the organization, be able to securely view and interact with the content if it is stored in this repository?
- **Restricted content** — Can access to specific content be restricted by user or role?
- **Granular permissions** — Does the system provide granular user permissions for uploading, viewing, editing, downloading, emailing, printing and/or deleting specific documents?
- **Audit trail** — Does this content repository provide an audit trail of all content-related user activity?
- **Encryption** — Does this repository allow for encryption and redaction of sensitive information contained within the content and metadata, such as credit card and ID numbers?
- **Content workflows** — Can uploaded content be routed through workflows to identify and amend misfiled documents, incomplete forms or incorrect information prior to being accessible?
- **Records management** — Can records management rules be applied to both protect the content from early deletion and to destroy the content according to published retention periods?
- **Scalability** — Has the repository been designed to handle large volumes of content without negatively impacting the performance of the system or size of the database?



# Reason No. 2:

Content services is more than a document repository

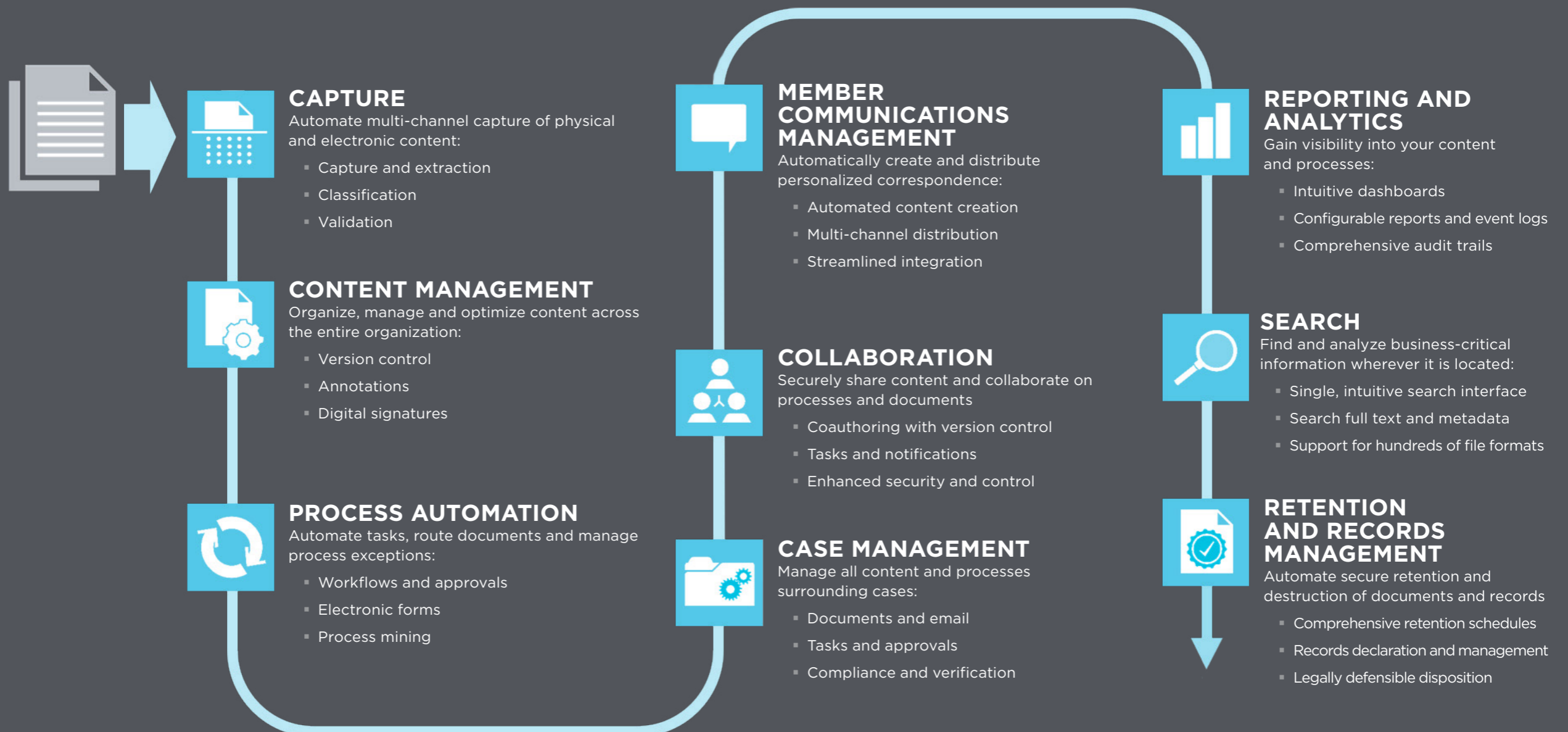


If a competing repository meets the needs we just outlined, you should next evaluate the other areas of the information lifecycle where a content services platform solution may provide additional value.

While other core business applications sometimes participate in this information lifecycle, they don't drive it. That wasn't the primary purpose they were designed for. This interconnecting space between core functions is where your organization generates real business value, and where the whole range of content services from Hyland comes into play.

## HOW EXPANDED SERVICES SET CONTENT SERVICES APART FROM DOCUMENT MANAGEMENT

Repository functionality is critical for managing content storage, but the business process involves so much more. A lot of other activity happens around your content — from intelligent capture all the way through to final disposition and destruction. Here's how content services goes beyond the repository.

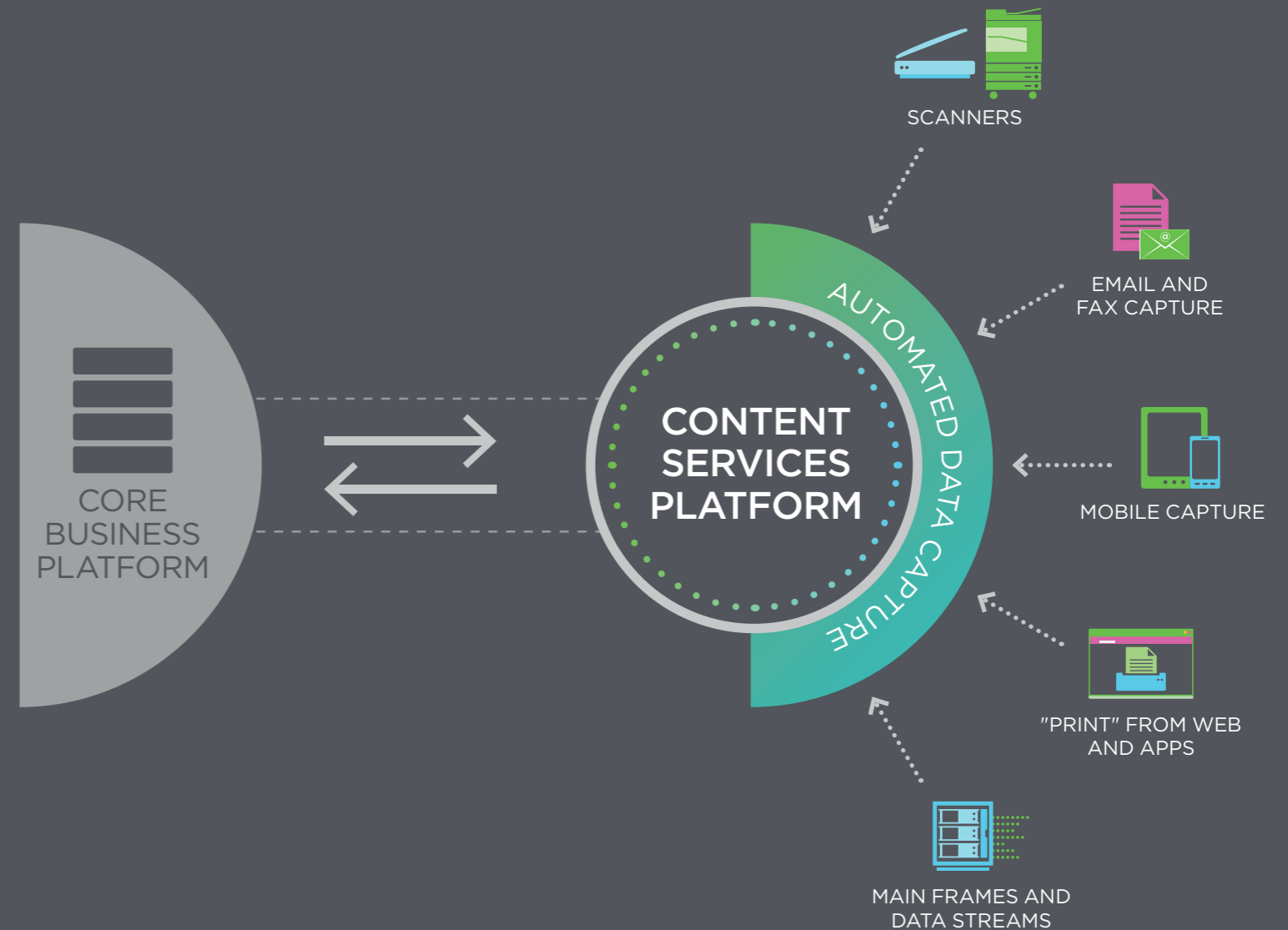




# CAPTURE

Your content management system should capture all critical content as early in the process as possible, with minimal manual data entry. It should:

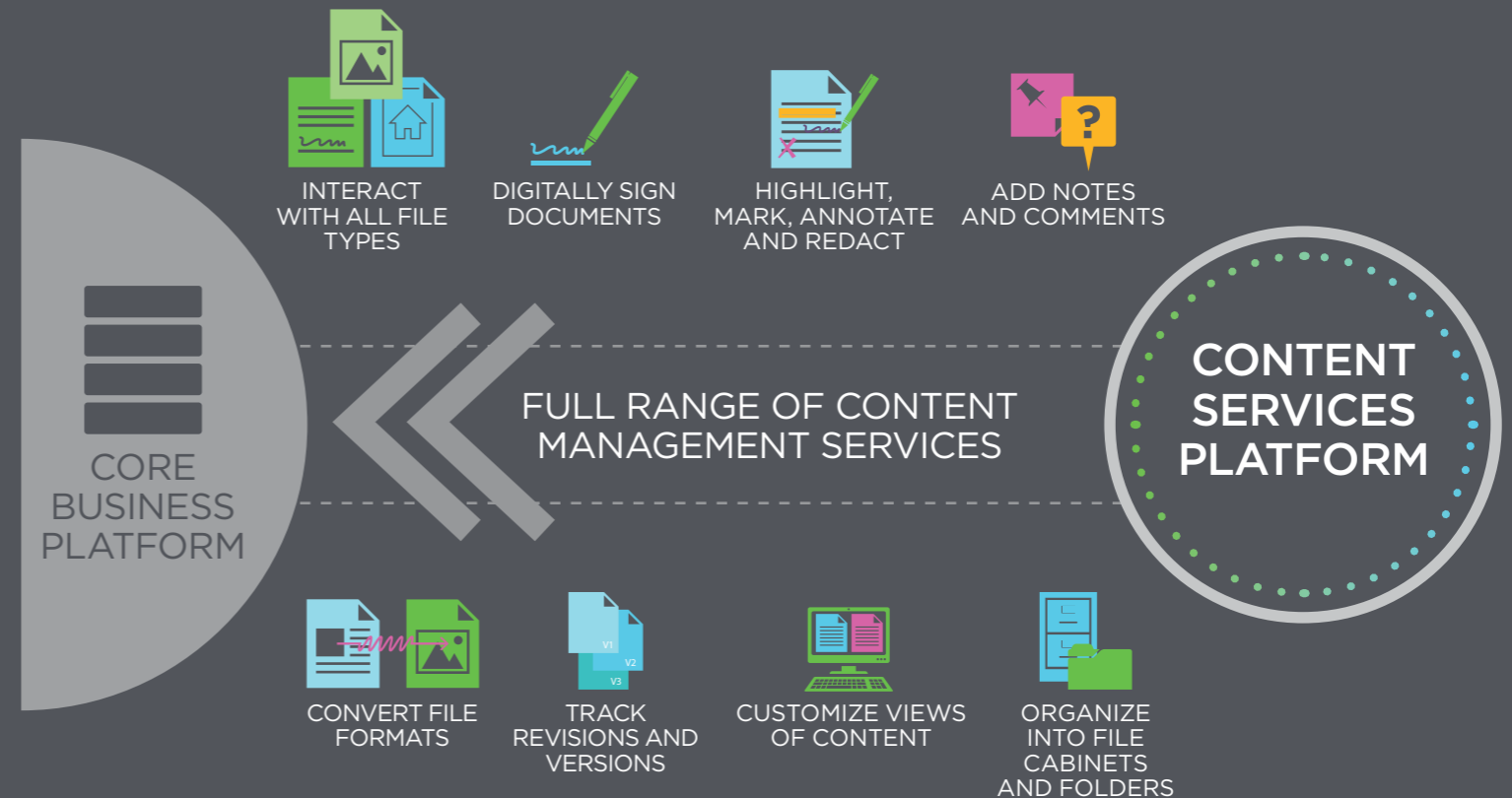
- Digitize paper documents as early in the process as possible by equipping users with the ability to scan documents at point-of-origin, such as via mobile devices, desktop scanners, shared multi-function printing devices and production scanners
- Make it easy for internal and external users to upload electronic documents by embedding upload capabilities into the user interface of your core business, office and email applications
- Eliminate as much manual data entry across your organization as possible by utilizing intelligent, automated and assisted capture methods



# CONTENT MANAGEMENT

Your content management platform should equip your users with all the tools they require to digitally interact with documents. It should allow you to:

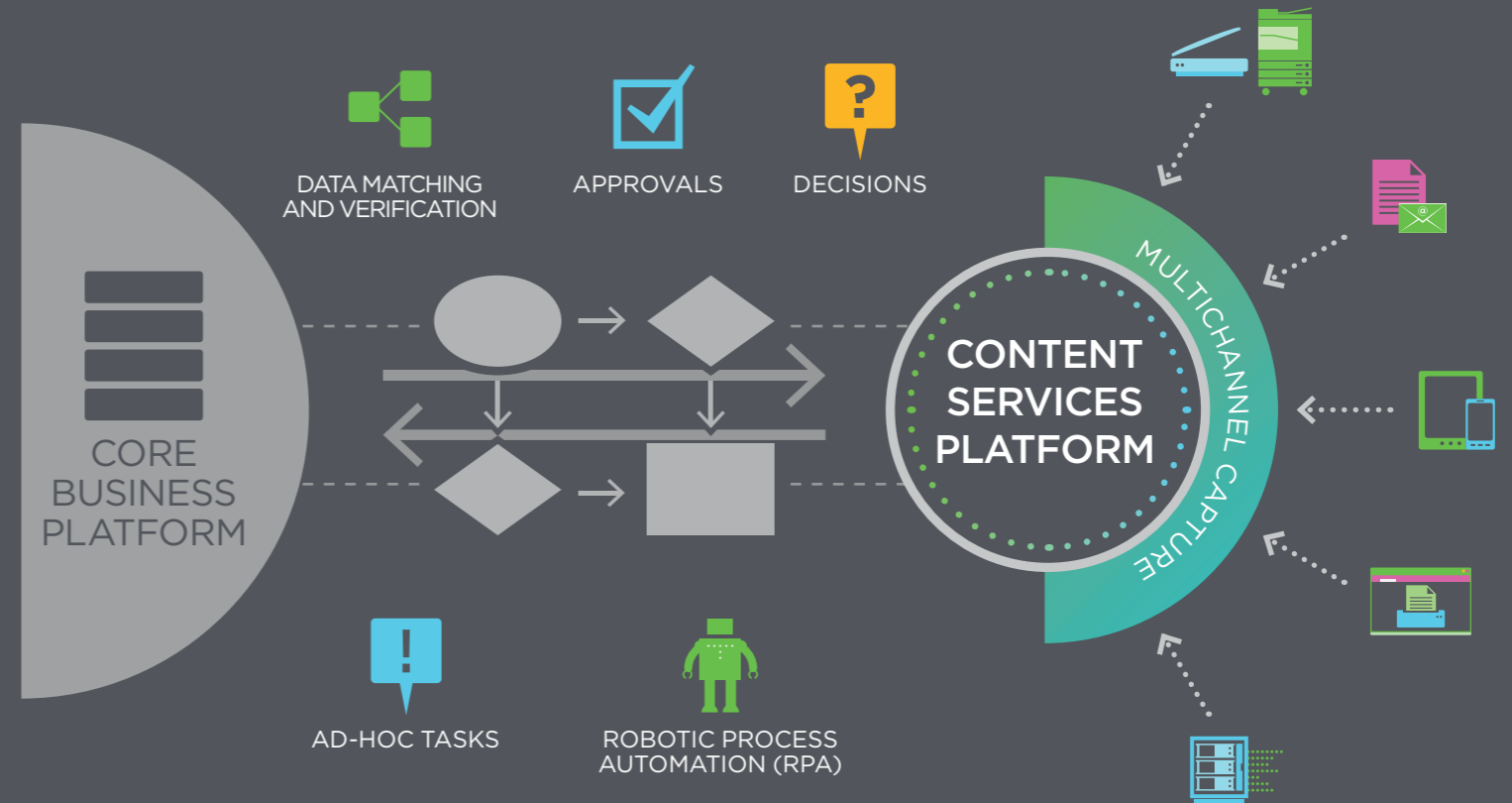
- Manage versions and revisions to ensure users access the most current content
- Add notes, stamps and other markups to support collaboration and processes
- Use electronic signatures to streamline processes and strengthen security
- Integrate content management tasks with your core business system to streamline business processes and the user experience



# PROCESS AUTOMATION

Your content management platform should allow you to add document-specific workflows and extend your processes. It should allow users to:

- Easily configure and deploy rules-based automated workflows, notifications and approval processes
- Dynamically surface relevant tasks to users based on business rules
- Use robotic process automation (RPA) to automate manual, rule-based, high-volume and repetitive tasks
- Add checks for completeness, accuracy and validity, and trigger notifications and exceptions as necessary

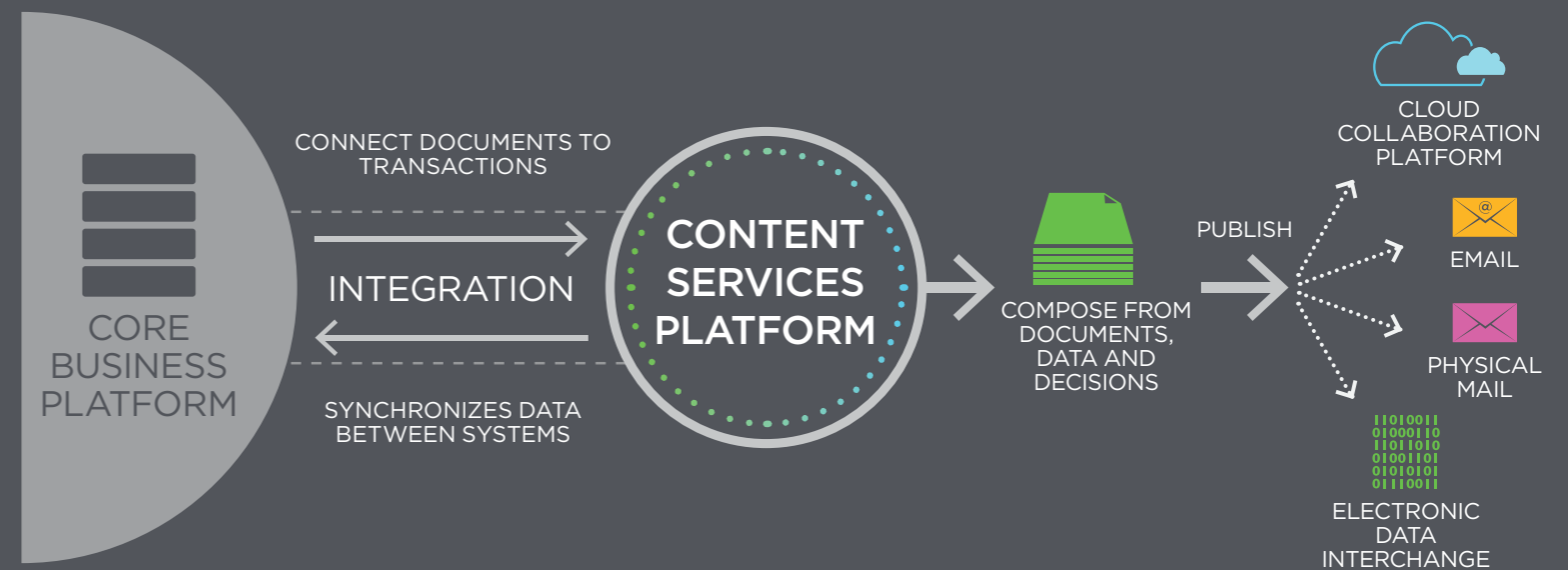




# MEMBER COMMUNICATIONS MANAGEMENT

Your content management platform should automate the generation and distribution of member communications wherever possible. It should allow users to:

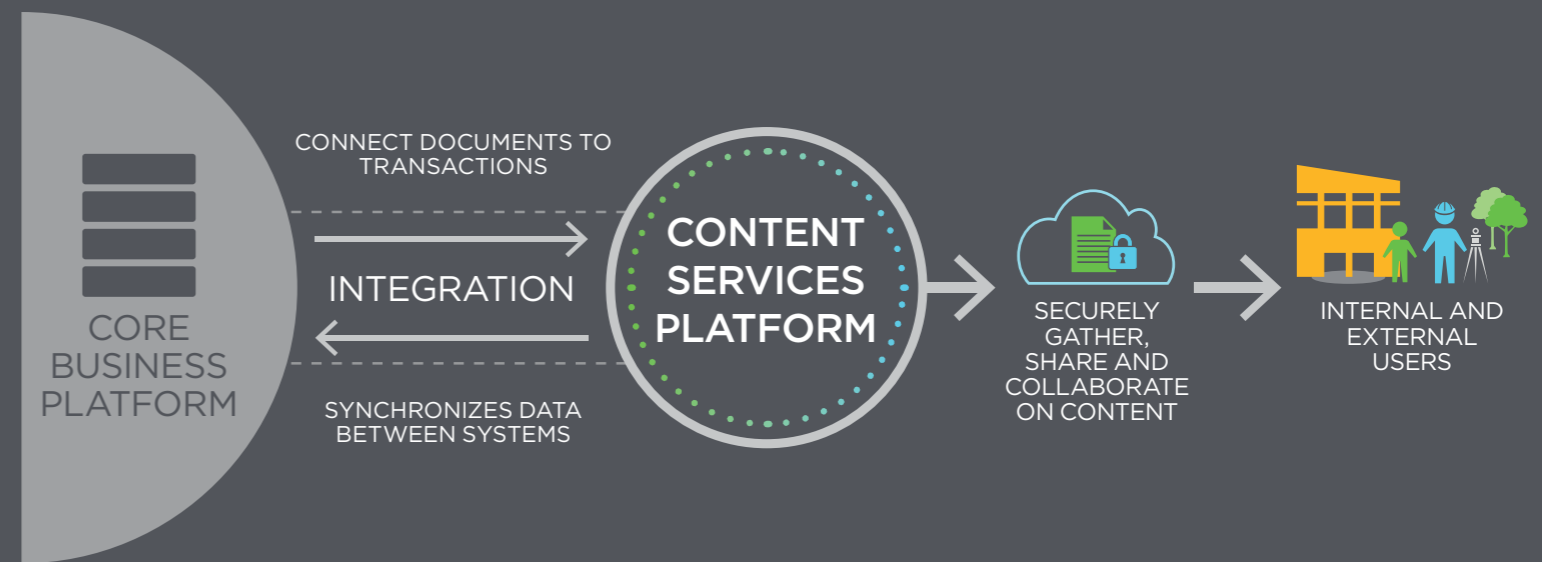
- Easily configure templates to standardize communication types
- Dynamically pull data from multiple source systems to create personalized communication
- Publish or export in formats that fit the needs of customers and your organization
- Ensure all relevant and up-to-date legal and regulatory information is always included



# COLLABORATION

Your content management platform should provide native collaboration tools that maximize control and security. Users should be able to:

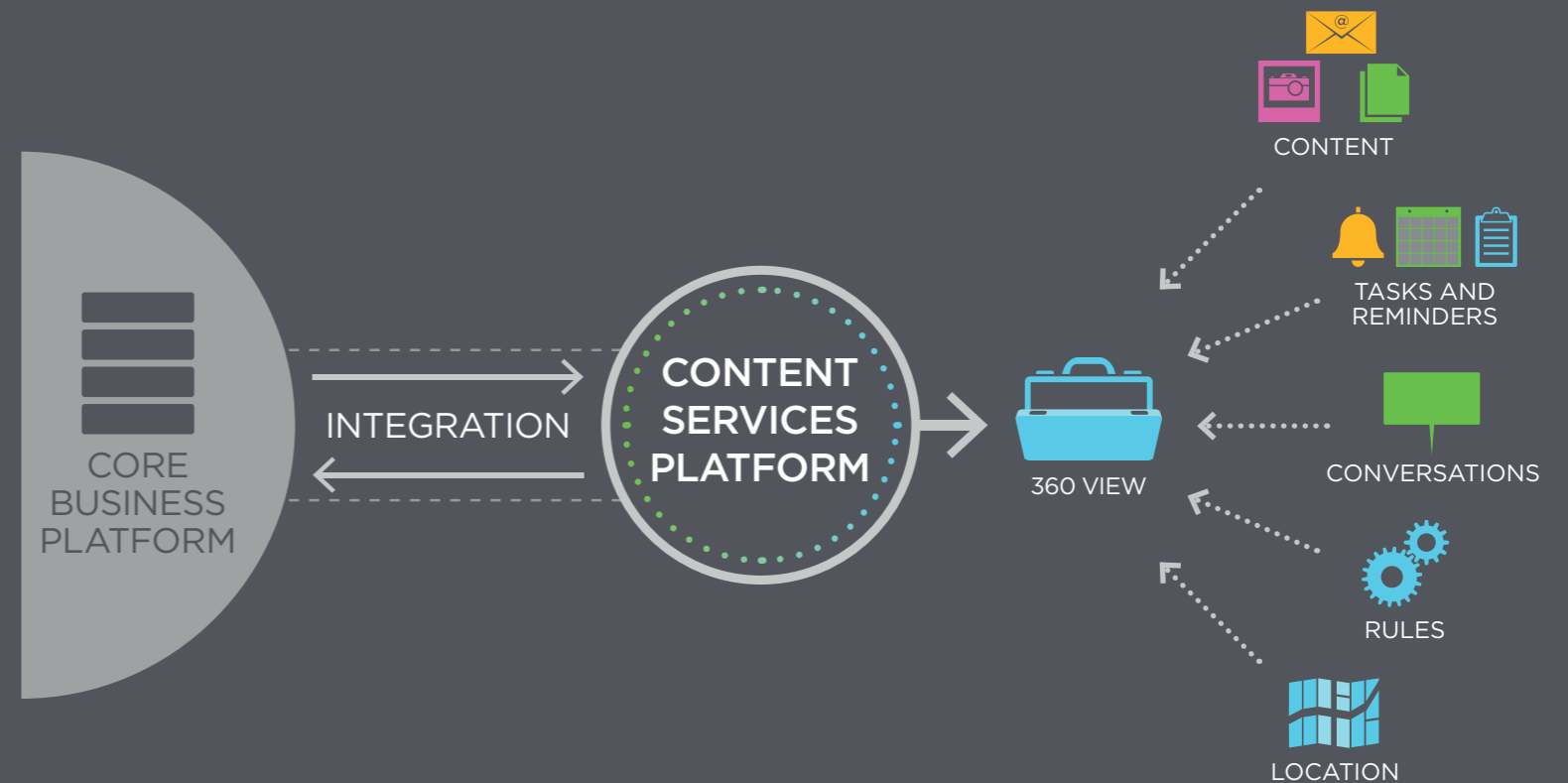
- Enjoy scalability, security and accessibility of a cloud-based solution while retaining full ownership and control
- Easily make edits and comments or create and assign tasks for shared files
- Protect shared data and maintain complete visibility into sharing, access and changes
- Automate the sharing of content by integrating your cloud-based sharing tool with your business workflows



# CASE MANAGEMENT

Your content services platform should manage all the data associated with tasks, activities, conversations and reminders alongside your content and processes. It should:

- Standardize best practices, automate repetitive tasks and manage supporting information and documents with a single solution
- Facilitate user collaboration through notes, threaded discussions and the history of activity surrounding a case
- Increase transparency and support compliance with comprehensive dashboards and audit trails
- Create data-driven applications to handle exceptions and investigations, which occur within your document-driven workflows

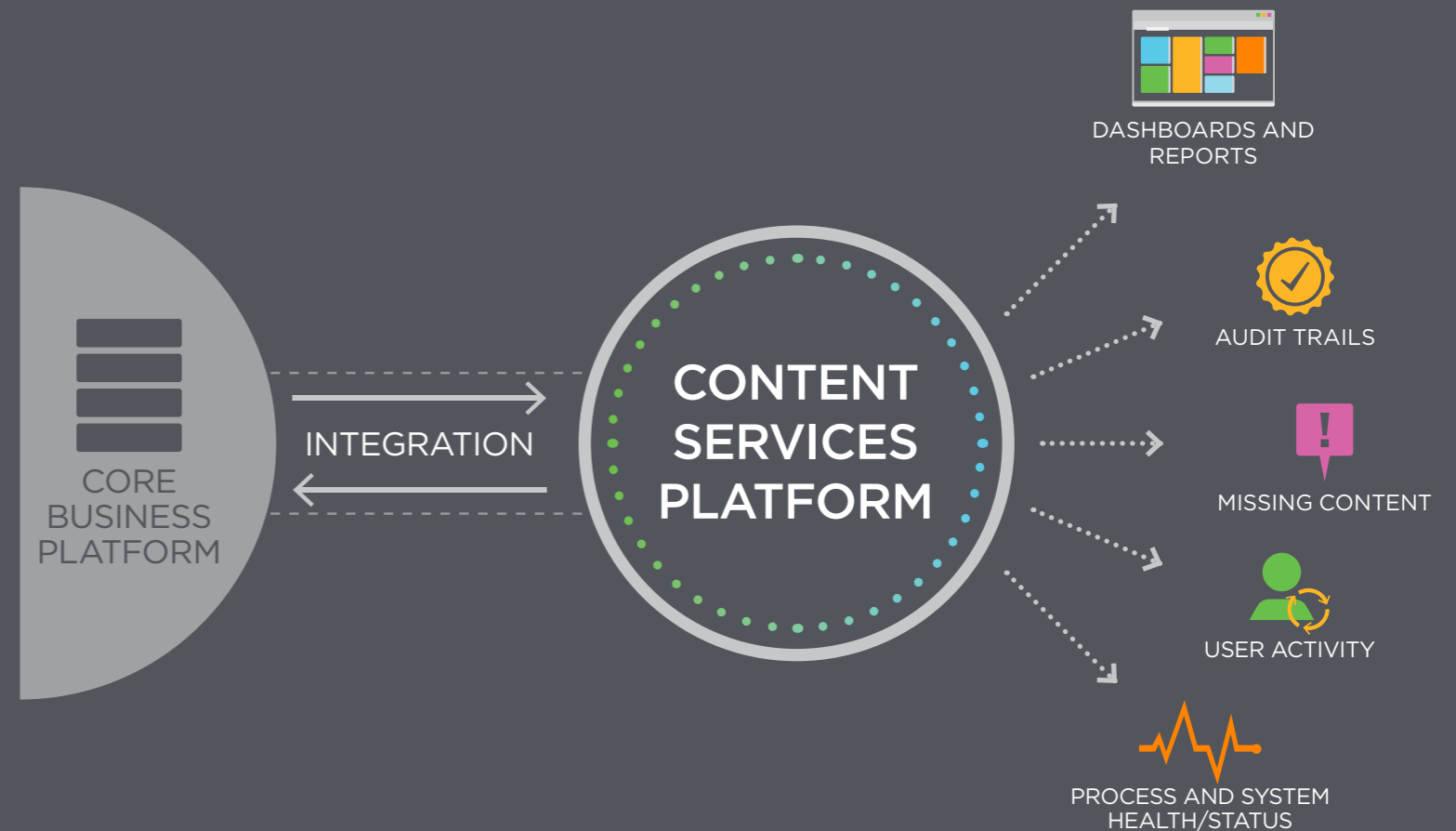




# REPORTING AND ANALYTICS

Your content management solution should provide a variety of dashboards displaying the status of processes, cases, user activity and overall system health. It should:

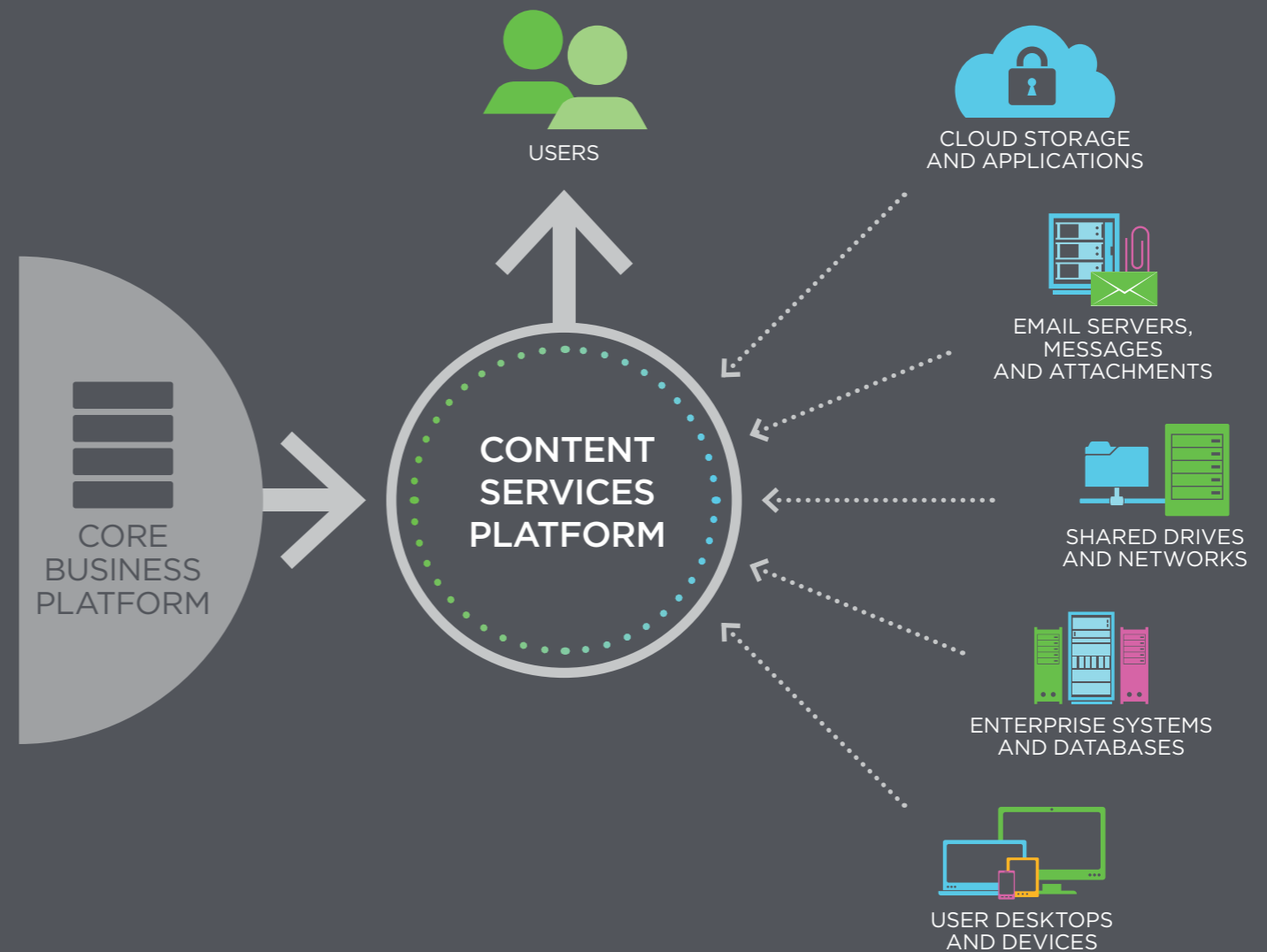
- Give users configurable visibility into relevant processes and systems
- Simplify audits and eDiscovery with comprehensive audit trails and logs
- Proactively identify missing, aging or expired content and notify the appropriate individuals automatically
- Provide external access to reports to keep your employees from being distracted by audits and data requests



# SEARCH

Your content management platform should provide the ability to quickly find specific information from data stored in multiple locations. It should:

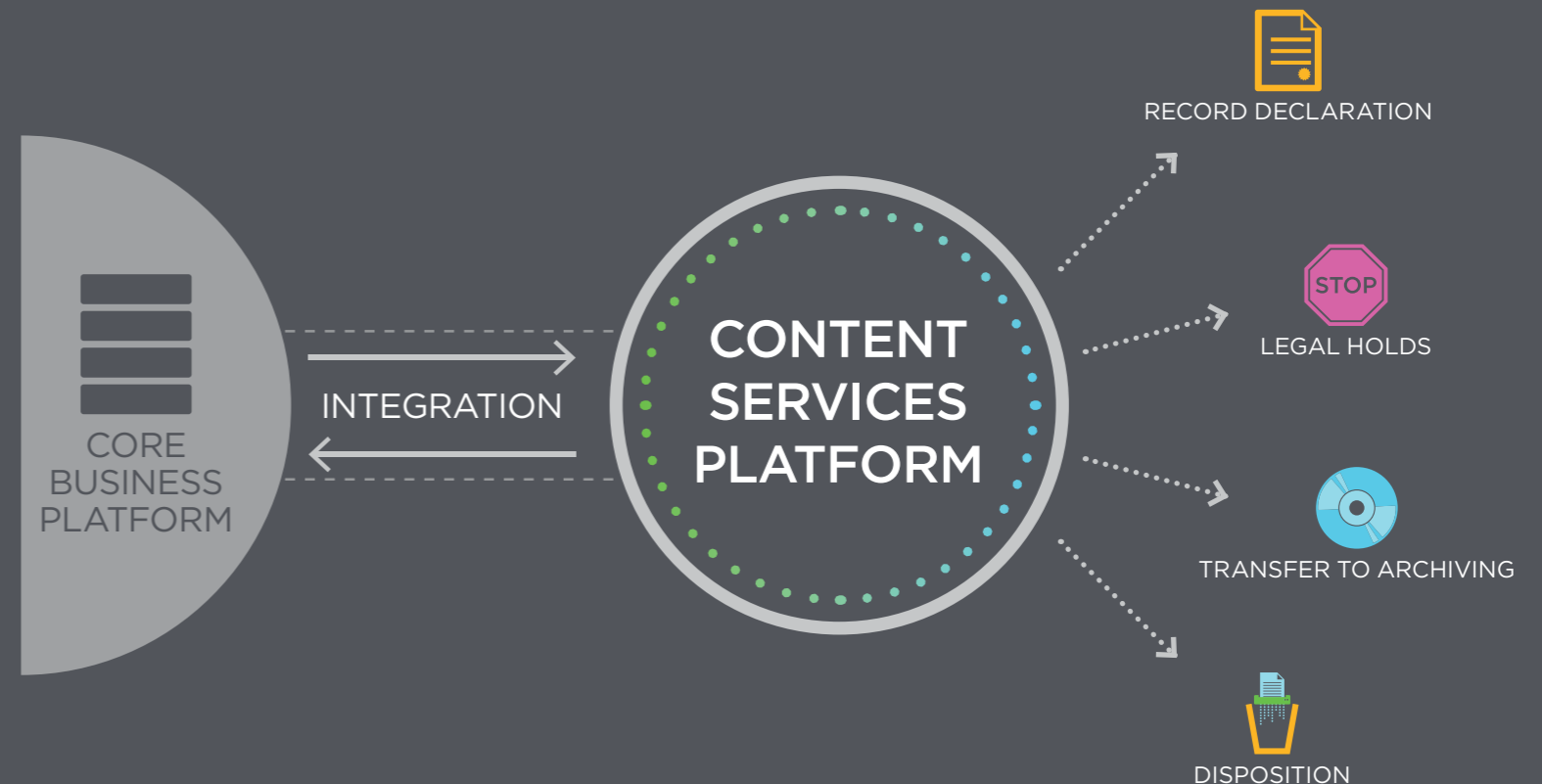
- Search across hundreds of systems, repositories and file formats from a single interface
- Use intuitive query design tools, relevancy rankings and refiners to get to the right information faster
- Use pattern searching (Social Security numbers, credit card numbers, etc.) to locate unauthorized private and confidential data across the organization
- Search beyond full text to find content hidden in comments, annotations and metadata



# RETENTION AND RECORDS MANAGEMENT

Your content management platform should implement retention periods to ensure your content is being preserved and will be destroyed according to published requirements. It should also:

- Automate all retention tasks including approvals, transfer to storage, legal holds, archival and deletion based on policies and regulations
- Centralize management of physical records alongside electronic records, with uniform retention policies and chain of custody
- Provide defensible auditing for the entire lifecycle of your records
- Ensure critical information is protected from early deletion by unauthorized users and can be placed on hold to protect from automated deletion when under audit or litigation





# Reason No. 3:

## Platform-level considerations



The expanded content services aren't the only differentiators. The platform that powers your solutions is equally important, but not all platforms are created equal. When evaluating competing products, be sure to also take measure of critical operational fundamentals:

### **Information security**

Help you protect your data and the privacy of your customers with comprehensive security capabilities from granular access controls to group policies, encryption and replication.

### **User experience**

From adaptable interfaces to streamlined persona-based apps, help create better user experiences for employees and customers.

### **Integration**

By easily integrating with enterprise platforms and third-party applications, you share information across your systems and increase the efficiency of your users.

### **Scalability**

Platform architecture is designed to manage high volumes of content to help you effortlessly expand capacity and performance of your on-premises or cloud environments.

### **Agility**

Intuitive configuration options allow you to add functionality to easily adapt to changing business and customer requirements.

### **Extensibility**

Leverage top-shelf technology to enable your own solutions, or configure new applications using low-code rapid application development platform.



# Checklist:

## Evaluating content capabilities



A content services platform is designed to complement and enhance core business platforms and applications — not to compete with them. Use the following checklists to help evaluate competing software.

**Repository evaluation**

Use this guide to launch an initial discovery of the content capabilities of whatever application your team is evaluating. With just 10 questions, you'll uncover where it stands on essential repository capabilities for long-term use across the enterprise.

		Yes/No	Hyland
<b>FILE FORMATS</b>	Can the repository manage all necessary file formats (e.g. emails, PDFs, images, office documents and rich media files?)		<b>YES</b>
<b>BATCH UPLOADS</b>	Can users scan or upload more than one document at a time into this repository?		<b>YES</b>
<b>MULTI-USER ACCESS</b>	Will everyone needing access, inside and outside the organization, be able to securely view and interact with the content if it is stored in this repository?		<b>YES</b>
<b>RESTRICTED CONTENT</b>	Can access to specific content be restricted by user or role?		<b>YES</b>
<b>GRANULAR PERMISSIONS</b>	Does the system provide granular user permissions for uploading, viewing, editing, downloading, emailing, printing and/or deleting specific documents?		<b>YES</b>
<b>AUDIT TRAIL</b>	Does this content repository provide an audit trail of all content-related user activity?		<b>YES</b>
<b>ENCRYPTION</b>	Does this repository allow for encryption and redaction of sensitive information contained within the content and metadata (e.g. credit card, ID numbers)?		<b>YES</b>
<b>CONTENT WORKFLOWS</b>	Can uploaded content be routed through workflows to identify and amend misfiled documents, incomplete or incorrect information prior to being accessible?		<b>YES</b>
<b>RECORDS MANAGEMENT</b>	Can records management rules be applied to protect the content from early deletion and to destroy according to published retention periods?		<b>YES</b>
<b>SCALABILITY</b>	Has the repository been designed to handle large volumes of content without negatively impacting the performance of the system or size of the database?		<b>YES</b>

If the native repository provided by your core business platform does not include essential capabilities for your long-term information management strategy, it is likely too basic for your needs.

**Full content services evaluation**

Does the system under evaluation offer the content services you require?

		Yes/No	Hyland
<b>CAPTURE</b>	Multi-channel, intelligent capture allowing content to be captured in any format from any location, device or source with minimal manual data entry.		<b>YES</b>
<b>CONTENT MANAGEMENT</b>	A variety of tools to equip users to digitally interact with content: digital signatures, highlights, annotations, redactions, file-type conversions, revisions and versions.		<b>YES</b>
<b>PROCESS AUTOMATION</b>	The ability to create and change document-centric workflows for your content without relying on code, scripting or the vendor.		<b>YES</b>
<b>MEMBER COMMUNICATIONS MANAGEMENT</b>	Automated generation of customer communications with multi-channel distribution — such as email, text and physical mail.		<b>YES</b>
<b>COLLABORATION</b>	The ability to securely share documents and collaborate with individuals inside and outside the organization without relying on email, FTP sites or unsanctioned file-sharing tools.		<b>YES</b>
<b>CASE MANAGEMENT</b>	A low-code platform to build applications and solutions to manage data associated with tasks, activities, conversations and reminders relating to your content and processes.		<b>YES</b>
<b>REPORTING AND ANALYTICS</b>	A variety of interactive dashboards displaying the status of content, processes, cases, user activity and overall system health.		<b>YES</b>
<b>SEARCH</b>	The ability to search multiple locations from a single search, utilizing advanced search logic such as wildcards, phrases, Boolean, fuzzy search and natural language processing.		<b>YES</b>
<b>RETENTION AND RECORDS MANAGEMENT</b>	Automated records management and retention to ensure that your content is both preserved and destroyed according to published requirements.		<b>YES</b>
<b>INTEGRATIONS</b>	Pre-built integrations with a variety of systems, office and email applications and repositories, enabling easy content retrieval and upload with an instantaneous exchange of data.		<b>YES</b>
<b>SECURITY</b>	Encryption of data and content at rest, during transmission across a network and while being accessed.		<b>YES</b>
<b>ARCHITECTURE</b>	Scalable, highly performant architecture that will meet the current and future content needs of the organization, on-premises, in a hybrid or pure cloud environment.		<b>YES</b>





# Expertly tailored to get the whole job done

Content Services helps healthcare payers work better, whether that impact is felt through the platform, user-optimized applications or extended services. A content services platform is designed to complement and enhance your core business platforms and applications — not to compete with them. Consider a content services platform to provide the modern tools your organization needs to evolve and grow.

## Want to learn more?

Visit [Hyland.com](https://www.hyland.com) and [Hyland Community](#) for /payer to learn more.

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