Case Management Automation: Process Improvement for Ad Hoc Processes

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Agenda

- Background
- General concept
- Case type modeling
- Ad hoc planning
- Guidance and accountability
- Business value
- Specification status
Background—OMG Specifications

– BPMN (Business Process Model & Notation)
  • Widely accepted process modeling notation
  • Defined, repeatable sequencing of activities
  • BPMN 2.0 completed this year

– CMPM (Case Management Process Modeling)
  • Modeling standard under development
  • Ad hoc activities driven by circumstances and expertise
  • RFP issued last year
  • Work in process
Definition of Case Management

“Case management is the management of long-lived collaborative processes that require coordination of knowledge, content, correspondence and resources to achieve a goal or objective. The path of execution cannot be pre-defined. Human judgment is required in determining how to proceed and the state of a case can be affected by external events.” [Singularity]
Case Management Examples

- Patient medical condition
- Legal action
- Machine repair
- Insurance claim assessment
- Help desk problem resolution
- Contract negotiation
- Business transformation
Relevance to Healthcare

- Patient care processes driven by situation
- Subject to professional judgment
- Potential billing by medical condition
- Demand for process improvement
  - Timeliness
  - Efficiency
  - Error reduction
- Provide planning and decision-making guidance
Case Management Automation

Case Type Model

Objective & Requirements

External Events

Case Management Execution

Manage operations
- Tasks
- Events
- Planning
- Decisions
- Collaborations
- Record-keeping

Case File

Plan

Subject

Applications

Participants

Model

Applications
Case Type Model

- Define case file and work product data structures
- Define roles and responsibilities
- Define building blocks for similar cases
- Define events and responses
- Incorporate best practices, rules and streamlining
Case File

Case File Part X
- Document A

Case File Part Y
- Document B

Case File Part Z
- Document C

Case type
- Case records
- Authorization
- Authentication
- Associated case files
- Disposition requirements
- Phase tracking
- Attributes & annotations

Authorization
- Action tracking
- Source
- History
Activities

– Human tasks
– Collaboration
– Automated tasks
– Decisions
– Dependencies
– External services
– Work product inputs and outputs
Case Execution: Planning as You Go

Modeling provides patterns and rules to assist in planning and decision-making
Events

- Internal: change of state of the case
- External: messages and handlers
- Time: periodic, point in time, duration
Plan Fragments

– Common pattern of related activities

– Range of scope
  • As big as a default plan
  • As small as two activities with a dependency

– Special cases
  • Starting activities
  • Completion activities
Runtime planning

– Elements and constraints from case type model
– Ad hoc planning for duration of case
– Plan defines activities executing or pending
– Each activity is performed once
– Event handlers resolve events
– Timers resolve delays
– Activities can be dependent on events or other activities
– Activities without dependencies are immediately executable
Guidance

– Business rules
– Potential alternatives
– Plan fragments
– Contingency plans
Case Startup & Closure

– Startup
  • Case type selection
  • Clarify case objectives
  • Identification of related resources and contacts
  • Initial plan
  • Team role assignments

– Closure
  • Closure authorization
  • Close open or pending tasks
  • Disposition of assets
  • Closure of accounts
  • Recommendations for follow-up
  • Case file access authorizations
  • Notifications to interested parties
Accountability

- Activity status
- KPIs (Key Performance Indicators)
- Signatures
- Approvals
- Case file audit trail
- Issue of alerts/alarms
Business Value

– Make better informed decisions
– Improve collaboration and timeliness of actions
– Improve record keeping & accountability
– Reduce errors and oversights
– Ensure policy compliance
– Evolve toward more repeatable processes
– Leverage knowledge worker creativity and empower work teams
Specification Status

- HP and Cordys collaboration
- Cordys concurrent implementation
- Initial OMG submissions in November
- Submitters
  - Axway
  - Cordys
  - Hewlett-Packard
  - IBM
  - Oracle
  - SAP
  - Unisys
Q&A

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