The FINEOS Care Plan
Data Sheet for Social Insurance

FINEOS

Working directly with customers to ensure a timely return to work or optimal quality of life is one of the most valuable ways an insurer can reduce claims durations, increase customer satisfaction, and ensure scheme sustainability.

As automation and self-service digital channels reduce time-consuming administrative claims functions and phone enquiries, case managers have more time to focus on these important, value-add activities. FINEOS supports case managers in every aspect of customer-centric planning with its contemporary Care Plan capability which has been designed in collaboration with FINEOS clients.

*"There is now clear evidence that system approaches which prevent or lessen psychosocial factors **can reduce work disability and its associated costs by 25-50%.** To improve patient outcomes, psychosocial barriers for individual cases must be proactively managed, whilst also reducing the psychosocial obstacles raised by current systems, processes and cultures."*

"It Pays To Care: Bringing evidence-informed practice to work injury schemes helps workers and their Workplaces," April 2022 - AFOEM Australasian Faculty of Occupational and Environmental Medicine

FINEOS Supports Care Planning Activities

Understand	Plan	Support	Manage	Collaborate	Learn
Education	Plan targets	Existing supports	Plan reviews	Case conferences	Insights
Jobs	Goal setting	New requests	Progress	Mobile case management	Tracking
Hobbies	Targets	Utilisations	Outcomes		Guidance
Family			Changes	External APIs	
			Timelines		

FINEOS Care Plan Designed by Case Managers for Case Managers

The primary role of the case manager in care planning is that of a facilitator: they must create the care plan at the right time, support all the stakeholders through the process, ensure the correct supports are in place to generate success and intervene when the plan is not tracking in the right direction.

The FINEOS Care Plan has been designed to make this process as simple as possible for the case manager, which is not easy as plans vary depending on both client needs and case manager preferences. FINEOS engaged case managers from eight different insurers to put user experience front and centre in the FINEOS Care Plan design. FINEOS User Experience (UX) experts listened to case managers' needs and solicited feedback on proposed designs. The results of this collaboration come to life in the final product.

Key Features of the FINEOS Care Plan

Personalised Planning	• Customer-centric • Holistic • Psychosocial factors	
Integrated Plans	• Contextual • Support needs • Quantifiable • Single source	
Accountability and Responsibility	• Manage expectations • Ownership • Progressive	
Collaboration via Digital Channels	• Engagement • Self-service • Security & privacy	
Dynamic Plans	• Manage change • Responsive • Early intervention	

"At the TAC, Client Planning is a core function which enables us to better manage the outcomes for our complex and most seriously injured clients. Over the last five years, the TAC has trialled different ways to support this in our claims systems and we were excited to be involved in the working group to help inform how this capability could be enabled through the FINEOS product roadmap.

Through a series of interactive workshops led by FINEOS product specialists, a number of TAC stakeholders shared their learnings in informing the direction of the FINEOS Care Plan. **At each step of the journey in this, the TAC team involved felt listened to and informed through each progressive workshop.**

As an outcome it was great to see our inputs included in the FINEOS Care Plan. As a follow-on to the Care Plan working group, the TAC continued on its journey with planning and partnered with FINEOS to implement the learnings into our current Claims System – implementing "myPlan" in TAC – which is based on the foundations of the learnings from the working group. There was full consensus across the TAC participants that the experience and involvement was highly valuable."

Cameron Baum, Senior Manager Claims Systems and Improvement, TAC Care Plan Working Group Member

Personalised Planning

To engage a customer in their plan, the case manager must understand the things that are important to them and what their world looks like outside of the claim. The FINEOS Care Plan "About Me" feature prompts the case manager to delve into the aspects of a customer's life that will help in personalising the planning process, such as family and work life, living situation, and interests. This information helps to develop goals that are important to the customer as opposed to focusing solely on the medical aspects arising from the injury. The case manager may also pick up on biopsychosocial factors requiring proactive management.

Collaboration via Digital Channels

Collaboration is one of the principles of a healthy injury insurance scheme identified by the Australasian Faculty of Occupational and Environmental Medicine in its paper, "It Pays to Care." It states, "Outcomes are improved when there is integration and collaboration between healthcare, workplace accommodation and case management." The FINEOS Care Plan is digital by design, and it has the APIs required to support digital collaboration among employers, providers, and external rehabilitation providers in a secure way. Each authorised stakeholder can actively participate in the plan with access to the relevant components to update the elements that are assigned to them.

Integrated Plans

When care planning is managed on external systems, there is an inherent missed opportunity to learn from successful plans and report on customer outcomes. The FINEOS Care Plan is fully integrated into the core claims platform, making the data available for reporting and learning. The FINEOS Care Plan can provide case managers with evidence-based prompts which support decisions they are making with all the participants in relation to the procurement of services. In addition, customer feedback on both internal and external rehabilitation services can also be captured in the FINEOS Care Plan to share with the providers to improve their service delivery. The predicted rehabilitation cost to support the plan, as well as the actual cost incurred, is captured against the plan to quantify its value and effectiveness.

Dynamic Plans

Customer circumstances change over time, as do their needs, and the supports required to help them achieve their goals. The FINEOS Care Plan is designed to be responsive to these changes by scheduling periodic reviews. Outcomes are collected from multiple sources to ensure the customer is achieving goals and the plan is progressing in the right direction. Alerts can be triggered when changing circumstances may require additional supports, such as the customer relocating, experiencing a relationship change, or the onset of secondary conditions. Early intervention by all participants is key and the case manager is equipped to manage these changes and provide the additional supports to avoid long-term impact.

Accountability and Responsibility

When multiple parties are participating in a customer plan, it is very important to know where the responsibilities lie so that everyone is clear on what is expected of them and when. This is also helpful in determining who can do what on the plan. The FINEOS Care Plan outlines agreed-upon goals and the actions required to achieve them. Each action is assigned to a stakeholder with a timeframe. Stakeholders are then responsible for updating that action and reporting to the group.

> *"The beauty of the design process is that it allows us to uncover user needs and priorities that are sometimes not immediately obvious to stakeholders.* ***It encourages all involved to truly understand the user journey and their existing pain points, and this way of thinking leads to insights and solutions that would be hard to achieve otherwise."***
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> **Fernanda Groetaers, Senior UX Designer, FINEOS, Care Plan Working Group Member**