Using Oracle Applications in Case Management
November 3rd 2011
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What is Case Management?

Case Management is simply defined as the creation and movement of an “electronic case” through its lifecycle.

Industry examples of Case Management include:
- **Banking**: Loan Application/Origination, New Account initiation
- **Healthcare**: Patient and medical records management
- **Insurance**: Claims processing
- **Legal**: Matter Management
- **Health and Life Sciences**: Drug application/ review, R&D support
- **Government**: Social Services Application, Law Enforcement
Case Management solutions provide benefits by automating and re-engineering processes.

Case Management solutions provide business benefits by automating and re-engineering case related business processes.

Solutions allow businesses to:

- Lower costs by making content electronically accessible
- Improve service quality
- Simplify collaboration and decision-making
- Improve process agility and flexibility
- Increase data consistency and accuracy
- Implement retention procedures
Different situations need different approaches for case management

Case management has several variations

• **Document-oriented case management** focuses on managing documents and their flow through the organization

• **Process-oriented case management** focuses on managing the variations and complexities in the case management process

• **Customer-oriented case management** focuses on customer information and customer interactions throughout the case processing
Document-oriented view of case management focuses on processing documents

- **Paper documents**
  - Incident reports
  - Pictures, images
  - Drawings
  - Crime Lab reports

- **Virtual documents/files**
  - Composite documents or files with multiple related elements

- **Electronic documents**
  - E-forms
  - Notice of removal
  - Benefit reports
  - Criminal record

**Centralized content repository**

- Scanning and imaging
- Computer-generated documents (reports)
- Records archive, security, and storage
- Internal & external data systems
- Search structured data systems
- Search unstructured data systems

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Customer-oriented view of case management focuses on structured customer data

Customer interactions

- Calls, electronic interactions
- Electronic documents
- Scanned pictures, images

Customer analysis

Business rules and automatic analysis based on multiple data sources

Customer data

- E-forms
- Customer data
- Customer service history
- Trusted data sources

Internal & external data systems

Computer-generated documents (reports)

Customer relationship management system

Search structured data systems

Search unstructured data systems

Records archive, security, and storage

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Oracle applications provide solutions to different types of case management

Oracle has several products that can be used to create the right case management solution for the need. The solution can be complemented with other products.

For document-oriented case management

- Oracle SOA Suite
- Oracle UCM

For process-oriented case management

- Oracle SOA Suite + BPM
- Oracle UCM

For customer-oriented case management

- Siebel Case Management
- Oracle UCM
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License application process is used to illustrate customer-oriented case management

The initial process is document-oriented and manual

**Capture**
- Customer applies for a license by filling an application form

**Assess**
- The officials evaluate the application and request additional information

**Decide**
- The officials make a decision and communicate it to customer

**Monitor**
- The officials monitor that the license is used correctly
The example process is transformed using a set of Oracle applications

Capture → Assess → Decide → Monitor

Case management: Siebel Case Management
Self-service portal: Oracle WebCenter Portal
Rules engine: Oracle Policy Automation

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The foundation is Siebel case management system that automates many process steps

- **Capture**
  - User creates the case directly to the system
  - Data validation
  - Automatic document generation

- **Assess**
  - Electronic case flows through the process
  - Work queues and workflow
  - Data fetched automatically from external data sources

- **Decide**
  - The decision is made directly in the system
  - Automatic document generation

- **Monitor**
  - The system monitors events and due dates
  - Automatic reminders
Oracle self-service portal gives flexibility and speed to customers and reduces costs

- Authenticated customer creates the case in self-service
  - Saves time for customers and officials
  - 24/7 service availability

- Self-service acts as a communication channel during the process
  - Automatic interaction history
  - Faster turn-around time

- The decision is published to self-service and customer is notified
  - Automatic notification and informing

- Customer can inform about changes through self-service
  - Automatic processing of updates
Oracle policy automation further automates and enables major re-engineering of the process

- Rules engine checks the application
  - Immediate feedback of next steps
  - Indication of possible decisions

- Rules engine determines the next steps
  - Process compliancy
  - Standardizes ways of working

- Rules engine prepares the decisions
  - Full automation of clear cases
  - Pre-checking for manual decisions

- Rules engine evaluates the events
  - Easier maintenance of rules
The transformed process provides customers faster and better service with lower cost

**Capture**
- User creates the case directly to the system or customer creates it in self-service
- Rules engine checks the application

**Assess**
- Electronic case flows through the process and rules engine determines the next steps
- Communication is facilitated by self-service portal

**Decide**
- Rules engine prepares the decisions and they are made directly in the system
- The decision is published to self-service and customer is notified

**Monitor**
- The system monitors events and due dates with rules engine
- Changes are processed through self-service
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Pick the right IT tools for the goals…

Case Management solutions provide business benefits by automating and re-engineering case related business processes.

Solutions allow businesses to:
• Lower costs by making content electronically accessible
• Improve service quality
• Simplify collaboration and decision-making
• Improve process agility and flexibility
• Increase data consistency and accuracy
• Implement retention procedures
... and manage the case management program itself as a business

Success factors for a case management program

**Customer Centric**
- Customer identification, segmentation, prioritization
- Responsibility for information creation

**Investment Driven**
- Understanding full costs, return, risks

**Outcomes Focus**
- Value provided
- Measuring, attaining, sustaining

**Measurement Mentality**
- Managing quality, costs, timelines, and people