Instructional Design Proposal

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Background

Unicare Corporation was founded in 1984 by its two owners in the basement of one of their homes in Cleveland, Ohio. It was created to deliver innovative solutions that would address income issues faced by hospitals, clinics, medical teaching centers and health systems across the United States. Unicare provides these solutions through 250 associates employed by seven distinct insurance eligibility and receivables management service lines. The primary responsibility of the associates in three of the seven service lines is to field calls exclusively from contracted Managed Care program members. This is done in an effort to reduce the cost of the members’ Medicare Part B premiums, and offer any available community and federal resources to enhance their quality of life. The three departments consist of the Customer Service Center (CSC), Hospital Care Assurance Program (HCAP) department, and the PremiumAssist service line, house a total of 70 associates.

Setting

On average, one PremiumAssist associate handles approximately 110 calls daily, and each associate from HCAP and CSC fields 325 calls daily. These calls, after being answered, may be transferred, saved to voicemail, or forwarded to other associates in order to complete the transaction process.

The cornerstone of Unicare’s business is the effective and efficient handling and processing of member calls. To that end, Unicare employs the use of Televantage phone client software to service all calls. Televantage is a software program that is accessed on
the associate’s computer and allows for efficient call management with the click of a mouse.

Problem Description

Unicare associates go through an intensive training program for their particular service line. At the end of their training session, associates are given a 15-minute overview by a member of the Office Support Team on how to use the phone. This session includes use of the handset, its buttons, and the general functionality of the phone, but does not include the use of the Televantage software client. The Televantage software client takes phone functionality options which are sequential in many instances, and allows the user to view options in a Windows environment where they can choose functionality more quickly.

After training, associates are expected to begin managing their calls immediately. They are allowed to use the phone for their first 30 days of employment, and expected to practice using the Televantage software client. After this time frame, associates are expected to become proficient using the software, and to cease using the phone except in instances where the Televantage software or their computer system may not be working.

Each associate’s performance is measured by reports run from the Televantage software client that are then compared to the benchmarks set by the Service Line leader. In an analysis of reports for the last three new hire groups, it was shown that every associate’s phone performance declined in two notable areas at the 30-60 day milestone. The first area of concern was that at the 31 day mark, the amount of calls taken decreased approximately 15-20%. The second area was that the amount of calls the associates lost or dropped increased by 12-23%. This pronounced drop in productivity influences the
service lines’ revenue projections negatively at a time when there should be an increase in profits based on an incremental increase in associate workload.

Description of Learners

The learners in the proposed pilot will be new associates assigned to the HCAP, CSC, and PremiumAssist service lines currently within their first 30 days with Unicare. These associates will have taken the phone training conducted by the Office Support Team as a prerequisite for the Televantage Software Client Training. Ten associates fit the criteria, and will be assigned to participate in the training project.

Goal Statement

The training department’s objective is to teach associates who use the Televantage software client how to process member calls correctly using specific functions, skills that result in minimized lost/dropped calls and increased number of calls handled successfully by the associates. Therefore, the goal statement is as follows:

Given access to the Televantage software on a computer, member services’ associates will be able to demonstrate proficiency using functions related to call handling prior to their 30 day milestone by correctly answering, transferring, forwarding, and saving calls using the software client. These learners will also demonstrate aptitude by meeting call handling benchmarks established by their Service Line Leader.