The U.S. Department of Veterans Affairs Chooses Microsoft Dynamics 365 and AKA Enterprise Solutions to Bring Six Critical Services Programs into a Single System—Creating a Veteran-Centric Environment

CHALLENGE

Find a case management solution that would provide a “holistic view” of each veteran—allowing case managers from different programs to provide prompt, consistent service

Since 1930, the U.S. Department of Veterans Affairs—or the VA—has been the agency responsible for ensuring military veterans and their families receive benefits, education, and other services. Accomplishing this mission involves many moving parts—programs, tools, and people in 50 regional offices around the world that touch the lives of each veteran at different points, depending on their needs. It is a monumental task to coordinate these efforts, and until recently, the VA was attempting to manage it without a centralized case management software system.

Specifically, case managers in six non-clinical programs in the Veterans Health Administration and the Veterans Benefits Administration were working with more than 100,000 seriously ill or injured veterans from Operation Enduring Freedom (OEF), Operation Iraqi Freedom (OIF) and Operation New Dawn (OND) conflict with health and benefit-related issues using the Veterans Tracking Application, a legacy system. Unfortunately, each program’s data was in a silo, so there was limited visibility and communication between programs. Case managers from other programs were often assisting in the same or similar processes for the veteran due to lack of visibility across the programs, which caused confusion and poor customer service. Data required to service the veterans and their family members was being tracked in more than 13 source systems within the VA network, forcing case managers to spend unnecessary time searching for critical information to provide needed care and benefits information.

The VA needed a centralized system that would present “one view” of each veteran so that case managers from every program could utilize all the information, regardless of program, creating a seamless experience for the veteran. The system needed to:

> Integrate with other agencies’ data and the VA legacy applications to improve care coordination by allowing case managers real-time access to data in one location

> Create a single care plan that would allow case managers in multiple programs to collaborate and manage goals with the veteran, reducing duplication of effort and confusion

ABOUT

The United States Department of Veterans Affairs (VA) is a government-run military veteran benefit system. The U.S. government’s second largest department, the VA employs nearly 280,000 people at hundreds of medical facilities, clinics, and benefits offices across the country, which administer programs for 22.2 million veterans. As veterans, family members, or survivors of veterans, about a quarter of the nation’s population is potentially eligible for VA benefits and services.
Automate common case management tasks, such as intake, assessments, eligibility, and case assignment, to reduce the amount of time spent by each case manager in a software application.

Enhance tracking and reporting capabilities, enabling case managers and program leadership to make more informed decisions and report the success of their program's efforts.

Increase the transparency of services and benefits available to veterans through an interface that provides self-service access to their personalized care plan.

**SOLUTION**

The VA decided on Microsoft Dynamics 365 because of its ability to handle the complex requirements of case management, as well as its flexibility, scalability, and ease of use. Microsoft Dynamics 365 also offered business process automation through its workflow engine and the ability to interface with other data systems. This provided a single user interface to the case managers, enabling them to provide care for their clients more effectively. Microsoft then introduced the VA to AKA as a potential implementation partner because of AKA's years of experience with Dynamics 365 and depth of knowledge in building enterprise case management solutions that support multiple lines of business.

After gaining a solid understanding of the project requirements, the AKA team was confident they could use their domain, facilitation, and integration expertise to collaborate with the dedicated, expert VA team to ensure successful delivery.

The VA was also attracted to AKA’s approach to the provider/client relationship. Being a government agency, they were accustomed to working with contractors that simply took orders, so they appreciated AKA’s collaborative approach—their willingness to offer advice and feedback based on experience and expertise.

**APPROACH**

A phased approach included a thorough data migration cleanse, interfacing with thirteen systems, and integration with a self-service portal and the Department of Defense case systems.

Through collaboration with the VA and the prime contractor, AKA built the Federal Case Management Tool (FCMT), replacing the majority of the Veterans Tracking Application, which was extremely costly to maintain. The first phase was a pilot program that migrated 45 case managers and their respective data on 1,500 veterans to the Dynamics CRM platform.

The pilot program supported the joint Department of Defense/Veteran's Affairs’ (DoD/VA) Federal Recovery Coordination Program (FRCP). This group of case managers provided lead support and coordination for both DoD and VA case managers working with seriously ill and injured service members, veterans, and their families as part of Operation Enduring Freedom (OEF), Operation Iraqi Freedom (OIF), and Operation New Dawn (OND).

The FRCP case managers used FCMT for three months and provided feedback on the effectiveness and ease of use that would allow other programs to consolidate onto the platform. Through a series of coordinated phases and releases, AKA migrated data and released functionality to support the following programs within the VA:

> The Veterans Health Administration (VHA) Liaisons for Healthcare
> The Veterans Benefits Administration (VBA) Case Managers and Benefits Coordinators
> VBA outreach program coordinators from the Chapter 63 Outreach and Casualty Assistance
> Veteran Employment Services Office (VESO) coordinators
This phased consolidation of data, features, and users allowed AKA to reduce risk and ensure the greatest level of support and training for end users. Through feature roll outs, the team was able to bring critical care information from 13 systems to the fingertips of case managers and provide self-service portal support to servicemembers, veterans and family members. FCMT also interfaced with the Department of Defense case management systems to provide case and client details for DoD case managers, which assisted in seamless transfer of care between the two agencies.

**RESULTS**

The FCMT solution now supports more than 1,500 case managers and other users who provide services and care to more than 100,000 seriously ill and injured veterans and service members worldwide. The system was piloted as one of the first inter-agency solutions for care management between the DoD and VA.

The efficiencies implemented through the Microsoft Dynamics 365 solution have contributed to the support of veterans by tracking case details and pertinent information to each of the programs and allowing them to easily share this information across programs, not only to preserve data integrity and accuracy, but to enhance the veteran’s experience. The new solution offered increased efficiencies, significant cost savings in support, and an improved client experience through:

- Essential capabilities, such as rules, workflows, tasks, calendaring, alerts, and mapping, that are easily configured to meet specific program needs
- Consolidation of data systems, increasing efficiency and reducing redundant data entry and potential errors
- A streamlined user interface with a familiar and optimized user experience
- The ability of veterans to view their personalized recovery plans through the eBenefits website
- Ad hoc reporting, charts, and dashboards that assist in daily client management and performance metric monitoring
- Workflow automation that eases the process of data entry, case assignments, and determining eligibility

Due to its impact on bringing world-class care through case management, care coordination, and customer service to servicemembers, veterans, and their families, the VA was recognized with the award for Industry Excellence in the Public Sector, acknowledging public organizations that achieve success using Microsoft Dynamics. AKA’s FCMT solution is part of that overall initiative, and the AKA team continues to work with the VA in modernizing their call centers and consolidating many line of business applications onto a single Microsoft Dynamics 365 platform.