

Portal Scalability Gives WellPoint a Flexible Platform
that Supports Ongoing Expansion

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PeopleSoft®

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Executive Summary

Since WellPoint's formation in 1992, a series of mergers and acquisitions made it one of the leading publicly traded healthcare companies in the United States. Rapid, continuous growth and increasing intranet use soon intensified the difficulty of locating information for associates and management. WellPoint's human resource information systems (HRIS) department could not use the intranet to leverage human resource data for management-level decision making. In addition, communicating with the company's 20,000 associates had become a challenge.

The vision of the HRIS department at WellPoint was to establish a single source for company-wide information via a portal. HRIS selected PeopleSoft Enterprise Portal because WellPoint relied on its PeopleSoft database to source HR information. Department leadership preferred to maximize efficiencies under a single vendor.

WellPoint's portal solution includes integration with PeopleSoft Enterprise HRMS, single signon, search capabilities, branding, and content management. A number of additional features enhance productivity and help WellPoint maximize the potential of its human resource data.

Enterprise Portal provides WellPoint with an open, flexible platform for integration and a solid information gateway that supports ongoing additions of internal and external user content. As a result of portal deployment, the HRIS department anticipates measurable time savings from increased call center efficiencies. Role-based personalization empowers users and adds to the time savings by reducing the number of steps necessary to access relevant information. HRIS also expects the portal to be widely used and highly instrumental in speeding integration, facilitating change management, and promoting cohesiveness in its business plans to continue to expand via mergers and acquisitions.

The WellPoint family of companies employs approximately 20,000 full-time associates in more than 90 offices around the U.S.

Medical membership:
More than 14 million

Specialty membership:
More than 50 million

Year 2002 revenues:
\$17.3 billion

WellPoint Company Profile

One of the nation's largest publicly traded healthcare companies, WellPoint currently serves the needs of more than 14 million medical members and more than 50 million specialty members nationwide.

WellPoint seeks to place individuals back in control of their health and financial future. The company provides consumer-friendly products that offer a choice of quality-branded health and related financial services to help achieve health security. These services are designed to meet the changing expectations of individuals, families, and their sponsors.

WellPoint was formed in 1992 to operate Blue Cross of California's managed care business. In 1996, WellPoint and Blue Cross of California merged into a single stockholder-owned company, WellPoint Health Networks Inc. (NYSE:WLP). The company operates through Blue Cross of California, Blue Cross and Blue Shield of Georgia, Blue Cross and Blue Shield of Missouri, Blue Cross and Blue Shield United of Wisconsin, HealthLink, and UNICARE.

Project Description

In 2000, WellPoint's HRIS department established the company's first intranet. Over time, it became the repository for extensive human resource information, including the associate handbook, policies and procedures, standards, requisites, and event tickets. As this collection of materials accumulated, locating specific information became extremely difficult. The original intranet-based structure lost effectiveness under the increasing variety of material HRIS had to support.

Meanwhile, WellPoint's rapid and consistent growth was making human resource administration increasingly cumbersome. The sheer size of WellPoint and the body of data that HRIS needed to maintain, coupled with continuous change, demanded capabilities the intranet could not provide. WellPoint needed to leverage human resource data as a planning tool to present quality information to management within short time frames.

Staff Vice President of HRIS and Administration Chuck Moore was charged with addressing the human capital management (HCM) side of the business through technology. Cost effectiveness was a primary concern.

"The HR budget is not going to double each time the company doubles," said Moore. "We have to minimize the resources and effort required to support the maintenance of company data while maximizing the quality and accuracy of that data. Management requires precise information when making decisions."

WellPoint also required a state-of-the-art tool for associate collaboration that would improve on a singular reliance on email distributions. Further, without the benefit of a role-based portal that identified and segregated users by job role, getting the right information to the right individuals by email or other electronic media had become an ongoing problem.

The Vision Defined

The HRIS department's vision was to create a common scalable platform from which associate information exchange could occur. WellPoint needed a centralized location for both associate and management-level data and consistent procedures for transactions such as salary increases and benefits elections.

"The foundation for the platform is the PeopleSoft application and database suite, coupled with systems such as payroll," said Moore. "We envision it as the information source for WellPoint—the gold standard, so to speak—that provides associate information for our active directory, Microsoft Outlook, 401(k) vendors, and so on, propagating changes of associate information to the appropriate locations. Associates should only have to update their information in one place."

The HRIS group chose portal technology to empower associates and to streamline collaboration from the human resources perspective.

“The portal is an opportunity to present information based upon an associate’s role in the company. Compared to an intranet, this is much, much more powerful—and much, much more important,” Moore said. “For example, we only want managers to see certain documents. Without a portal, we have no way to do that.”

In addition to the intranet, the HRIS department had developed a password-protected, secure site for human resources. Part of the HRIS vision was making this site available via a role-based portal. “We started to get a lot of criticism about clumsy navigation on both the HR site and the intranet: too much to figure out, too hard, time consuming, too many clicks,” said Moore, who believes the purpose of the portal is both to reduce the time it takes to locate material and to improve the user experience.

WellPoint’s Portal Selection Process

For HRIS, portal selection was based on WellPoint’s use of PeopleSoft’s business application foundation and embedded business expertise. “Our authoritative source is PeopleSoft for HR, payroll, and finance,” noted Jay Baltazar, IT project manager at WellPoint. “Because those are major components of our infrastructure, PeopleSoft was the ideal choice for the underlying portal technology.”

As Moore’s group spearheaded WellPoint’s move to a portal, he found that combining the feature-rich, HCM-oriented Enterprise Portal with WellPoint’s existing PeopleSoft foundation maintained the critical continuity of a single vendor. This blend helped ensure database integrity and facilitate smooth upgrades.

“I am particularly averse to having other vendor products reach into our database for information. Niche portal vendors talk about building code to go into a PeopleSoft database, but I don’t like that idea. For instance, whenever there’s an upgrade, you have to update the other vendor’s code at the same time,” said Moore, who knew the value of vendor reliability and consistency. “Integrating through a PeopleSoft portal made a great deal of sense—you’d have to give me a good reason why not to use it.”

Strategy and Implementation

Prior to implementation, WellPoint participated in a portal strategy workshop provided by PeopleSoft. This proactive workshop for the education and preparation of new portal clients included discovery sessions that helped clients understand the portal features that best addressed their business needs. The workshop helped define the purpose and scope of the portal and covered topics such as security, information architecture, and taxonomy (the grouping of links in a tree-like structure for quick selection). The workshop’s end result was an informed client with a solid implementation strategy.

“I was impressed with the strategy process,” said Baltazar. “The discovery session was very, very helpful for us. The instruction about taxonomy was also important—without it, we would just have a collection of data and would have much more difficulty in how to get to it.”

WellPoint carried the information from the strategy workshop forward into the implementation process, which PeopleSoft Global Services managed. Initial steps involved designing the information architecture and taxonomy and establishing WellPoint's desired branding conventions for the interface design. Additional procedures entailed setting up single signon into PeopleSoft and non-PeopleSoft applications, implementing PeopleSoft Enterprise HRMS Portal Pack, and laying the foundation for limited role-based access to PeopleSoft Enterprise Financial Management.

The HRIS department also selected a number of other portal features. PeopleSoft Global Services included these features in the implementation process according to customizations that HRIS requested to address specific HR-related needs.

WellPoint chose the following PeopleSoft Enterprise Portal features:

- **PeopleSoft Enterprise HRMS Portal Pack:** Delivers specific HRMS content and functionality in the form of pagelets.
- **Single Signon:** Gives users role-based access to relevant applications after signing on only once.
- **Search:** Indexes content for access via the embedded Verity search engine.
- **Homepage Branding:** Provides a distinctive website design that allows WellPoint to add its own look and feel.
- **Content Management:** Lets WellPoint create and manage content collaboratively in workgroups.
- **Integrated Task List:** Provides convenient access to personal task items.
- **Third-Party Email Access:** Gives employees access to Outlook Web Access (OWA) email information without leaving the portal.
- **Pagelet Wizard:** Enables transformation of data into pagelets.
- **Company News:** Gives WellPoint an easy-to-use format for presenting news to specific groups.
- **My Link:** Lets users easily access the most frequently required content.
- **Directory Authentication:** Integrates the Enterprise Portal with Microsoft Active Directory for user authentications.
- **Shortcut Collections:** Provide groupings of links that address a user's or group's business needs.
- **Related Content:** Displays content related to a task.

Benefits Achieved

PeopleSoft Enterprise Portal is newly deployed at WellPoint. Implementing the strategy developed in the original workshop gives HRIS reason to anticipate significant benefits that will save WellPoint time and money. Moore indicated that the ability for users to locate information online will be the biggest advantage of the new portal system.

Increased Call Center Efficiencies

Results from portal deployment include taking the heat off WellPoint's human resource call center by effectively addressing the bulk of associate questions online. HRIS recognizes that the portal provides even more value than associates expect.

As associates become accustomed to routine portal use, they rely on it more consistently. Over time, they will contact the call center for only the most complex issues.

"Our HR call center gets 500 to 600 calls a day. The portal provides an easy way for associates to get answers to their questions online," Moore said. "Associates aren't waiting in the queue, and they get answers more quickly."

The impact of WellPoint's new portal system with respect to the call center alone is one of time savings for human resources and other WellPoint associates. Both groups can devote more time to activities that increase their productivity, thus helping to improve the profitability of the company as a whole.

A More Positive User Experience

Although WellPoint's intranet lacked the means to present content for easy selection, the portal provides an intelligently organized, role-based taxonomy coupled with search capabilities. With more than 25 customizable features, the portal is designed to empower associates and add value to the overall user experience. Even casual users can quickly take advantage of the intuitive, personalized interface to access self-service and task-related materials.

By drawing information from the intranet and other locations, the portal's content manager helps HRIS organize and readily display critical material that was previously buried. Where in the past users had difficulty locating information on the intranet and human resource site, now multiple tabs allow them to locate and use role-based information quickly. Shortcut collections (groupings of task-specific links), task lists, and personalized links take associates directly to material relevant to their jobs.

According to Moore and his team, "PeopleSoft's is a full-fledged portal, and it contains all the features niche vendors supply. The multiple tab system is working out well, and shortcut collections in document manager allow us to flesh out items we want to include from the intranet. Role-based access makes those shortcut collections more valuable."

HRIS was given a mandate from the WellPoint IT department to secure a single-user, single-password administrative interface for portal users, and integrating applications under single signon achieved this objective. Real-time access to the active directory from the logon presents an excellent benefit for HRIS, both for general associate use and in future collaborative efforts with other departments. “By providing single signon capabilities and customizing the portal for us, PeopleSoft is giving us very good flexibility,” Moore stated.

WellPoint is also enhancing the user experience through related content, a feature within PeopleSoft’s Intelligent Context Manager that displays content pertinent to subject matter a user is accessing. Another feature, company news, lets WellPoint departments post articles that target specific groups according to role-based security. These capabilities are a clear improvement over the limited capabilities of WellPoint’s intranet.

Increased Effectiveness, Decreased Maintenance Requirements

Human resource data, the backbone of any HRIS portal system, is mandatory for the role-based access that drives effective HCM. The portal can also use this data for analytics that facilitate a successful end-to-end business process with measurable results.

By choosing Enterprise Portal, WellPoint positioned itself to smoothly access human resource data across solutions from a single vendor. WellPoint’s PeopleSoft database and Enterprise Portal work together for a robust, effective system that is equipped for efficient long-term expansion and easy maintenance.

“I believe quite strongly in relying on a single vendor and a single toolset for ease of maintenance. We’re leveraging our training dollars by using just one tool. Although the portal is a little bit different from PeopleSoft Enterprise HRMS, the tools we’re using to edit and store programs are the same,” said Moore. He also looks forward to promoting a paperless system.

An Open, Flexible Platform for Integration

One reason HRIS invested in PeopleSoft Enterprise Portal was to secure smooth integration with other PeopleSoft applications, eliminating the need for additional integration technologies. PeopleSoft’s open framework enables the HRIS department to integrate third-party vendor applications directly into the portal, which is fundamental to the vision of the PeopleSoft foundation.

“If I have HR software on-site, you’ve got to give me a good argument as to why it’s not PeopleSoft,” stated Moore. “However, if it’s off-site in an ASP model, I want to offer it through our portal. We’re integrating our outside vendors into the WellPoint portal, such as our 401(k) vendor.”

Customized portal branding and single signon make the transition to third-party vendor applications seamless to the user. Enterprise Portal identifies users and their roles in the company, recognizing user IDs and passwords for other outside applications. A user who selects 401(k) will access the 401(k) vendor site without having to remember a separate 401(k) user ID and password.

A Collaborative Gateway

HRIS's portal strategy was based on user needs and focused on the importance of HCM and accurate human resource data to create a practical, useful, and effective gateway. The result is a solid framework on which HRIS can add content and transactions as needed. Further, Enterprise Portal lets WellPoint run third-party applications through the portal without incurring additional fees.

WellPoint anticipates adding access to external applications on an ongoing basis. Case in point is WellPoint's third-party eProcurement provider, which recently asked WellPoint HRIS to integrate its eProcurement solution with WellPoint's new portal.

"Over time, owners of outside content will ask for space on the portal, which might well become the de facto portal for all WellPoint associates," Moore commented. "We refer to the portal as the PeopleSoft Gateway and expect it to become the gateway of information for HR and finance at WellPoint—and possibly even more than that."

Future Plans

"The portal is a foundation for future development and deployment at WellPoint," Baltazar said. "We plan on integrating more applications, introducing live chat, and adding features to build on top of the portal. In doing this, we'll be bringing our associates a productivity tool that gets better as time goes on."

PeopleSoft's solid technical foundation provides a robust portal framework that can easily scale with WellPoint while addressing the personalized needs of all users. PeopleSoft's application and portal capabilities in human resources will help support change management and continuation of the WellPoint corporate culture via a consistent message.

"PeopleSoft's portal will help facilitate WellPoint's aggressive business plan of expanding via mergers and acquisitions; specifically with the people, data and integration processes, as well as assisting with change management," said Moore. "Getting information to the right people—management, nonmanagement, union, nonunion, and so on—at the right time through the portal will make a significant difference."



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