

Case Study

**Western Health  
Advantage keeps  
policies current  
and compliant  
with Upland  
Panviva.**



**INDUSTRY**  
**Healthcare**

**COMPANY**

**Western Health  
Advantage**  
Sacramento, CA  
[westernhealth.com](https://westernhealth.com)

Since its inception in 1996, Western Health Advantage has become a quality health plan for local business owners and individuals interested in affordable, responsive health coverage.



**Western Health Advantage** uses Upland Software's Panviva to keep their call center staff up-to-date on the latest policy and procedural changes, reducing the risk of compliance errors and increasing confidence in supervisors and staff alike.



# How can you ensure every agent has the most up-to-date information?

## Western Health couldn't track which employees knew what.

Call center agents were faced with a constant stream of policy and procedural changes, but there was no way to track who had received the latest updates. Information was stored in various databases, and changes were communicated via email.

The lack of consistent policy enforcement put Western Health at risk for compliance issues.

## Western Health consolidated knowledge with Panviva.

Implementing Panviva allowed Western Health to consolidate multiple databases into one. Panviva's contextual search function means that every employee has access to the most up-to-date information.

*"Compliance loves Panviva.  
Everything is documented.  
We have immediate proof of  
policy changes."*

**– Lisa Angst**

Project Manager, Western Health  
Advantage

# Updates are communicated automatically using Panviva.

## Directors glimpsed a better way.

Company directors first learned about Panviva at a healthcare alliance conference. The hands-on demo of Panviva's capabilities to consolidate information storage and provide the right information at the moment of need convinced the Western Health team to give the product a try.

"We were in the stone age with our piles of papers and paperclips. We needed to move from the basics to light speed," says project manager Lisa Angst.

## With Panviva, Western Health has increased visibility for supervisors and confidence for reps.

Panviva's automatic updates did more than get all call center staff on the (literal)

same page. They also enabled supervisors to track how quickly staffers were seeing and acting on the new policies.

"We love having the ability to update something right away. We are letting people know about issues and hot topics immediately," Angst explains. "With Panviva's auditing capability, we know when a call process or document was updated and who is learning about it. When we push live, we can see who has not accessed the document. That feature lets us provide an extra reminder to that person so they can be more efficient in their job."

Panviva has also improved the confidence levels of their new agents. "We had one new person who was very anxious about getting on the phones during training,"

remembers Angst. "After her first day, she told me that if it had not been for Panviva she would have had a 'meltdown'. Instead by the end of the first day, she was excited to work by herself."

## Results for Western Health Advantage

### faster

Call times

### consistent

Delivery of policy updates

### reduced risk

Of compliance errors