

## MSDM Features and Benefits (Member Services and Document Management)

### Maintainable Solution

- MSDM runs on the Convergence platform, which is kept up to date with all improvements, enhancements, and upgrades allowing MSDM to evolve with the platform and eliminating the risk of becoming obsolete and unsupported
- Application workflows that can be easily added, modified, or removed as the business requirements change
- User, workflow, and platform management tools allow for easy and intuitive configuration

### User Experience

- Advanced search capabilities allow users to search for documents by indexed information including application ID, customer ID, first name, last name, date of birth, and application date

- The search page allows users to search through documents that have already been uploaded to MSDM, import a new document directly to the application, or export a set of selected documents

<input checked="" type="checkbox"/>	IM Group	IM Cover Sheet	Notes.png	APR 05 2017 09:44AM	testuser4	asdf	test
<input checked="" type="checkbox"/>	EMS Group	EMS Denial Reason	Notes.png	APR 12 2017 12:46PM	msdmadmin		
<input type="checkbox"/>	IM Group	IM Denial Reason	Notes12.png.pdf	APR 05 2017 09:45AM	testuser4	asdf	asdf
<input checked="" type="checkbox"/>	EMS Group	Emergency TennCare Application	w4_fillableDerekRename.pdf	APR 04 2017 01:20PM	msdmadmin	John	Breinig

Showing 1 to 7 of 7 entries

- The “notes” button opens a dialogue box that displays a list of existing document notes, if there were any, and allows for new notes to be entered
- The document viewer provides standard tools (zoom, page forward, page back, jump to page, open bookmarks) to assist in navigating the document to find desired information



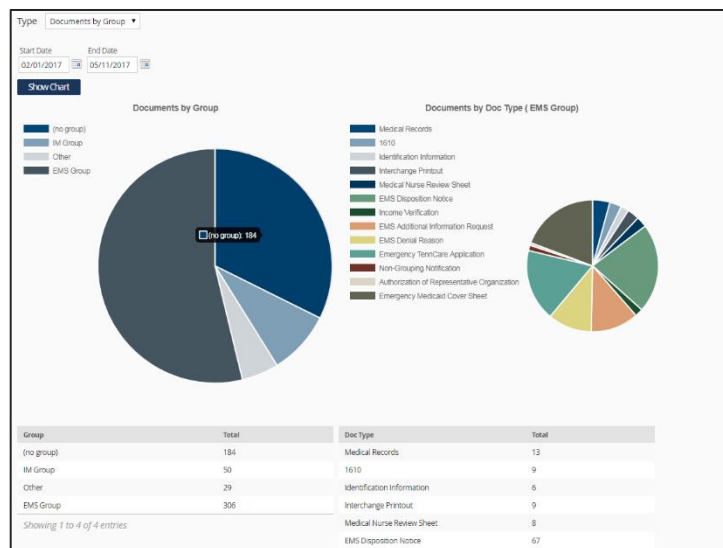
- Automation features improve workflow and efficiency while also removing complexity of tasks
- Intelligent web page controls allow for better data validation and accuracy
- Modern interface removes clutter on user pages and creates an intuitive experience
- Privileges can be enabled to allow certain users to easily manipulate documents to remove extraneous pages of data or help enhance document images for readability and understanding
- The application administrator is able to edit Document Types and index fields via the Manage Document Types section under the Administrative Page

APPLICATIONID	APPLICATIONMEMBERID	SSN	APPLICANTFIRSTNAME	APPLICANTLASTNAME	DOB	GENDER	CONTACTLASTNAME
422992157	13172911628941222222	111111111	John	Smith	01/01/1980	Male	John Smith
422992157	13172911628941222222	111111111	Jane	Smith	02/02/1985	Female	Jane Smith
422992157	13172911628941222222	111111111	Bob	Smith	03/03/1990	Male	Bob Smith
422992157	13172911628941222222	111111111	Alice	Smith	04/04/1995	Female	Alice Smith
422992157	13172911628941222222	111111111	Charlie	Smith	05/05/2000	Male	Charlie Smith
422992157	13172911628941222222	111111111	Diana	Smith	06/06/2005	Female	Diana Smith
422992157	13172911628941222222	111111111	Eve	Smith	07/07/2010	Female	Eve Smith
422992157	13172911628941222222	111111111	Frank	Smith	08/08/2015	Male	Frank Smith
422992157	13172911628941222222	111111111	Grace	Smith	09/09/2020	Female	Grace Smith
422992157	13172911628941222222	111111111	Henry	Smith	10/10/2025	Male	Henry Smith

## Automation Features

- Embedded tools provide an analysis of data and documents to ensure proper data capture of all relevant information
- Complex back-end workflows used to automate process and eliminate all manual and paper tasks

- Reporting tools allow users to view the nature of documents in the system across, and within assigned groups, and helps managers and supervisors visualize their teams, and even specific user's activities within the system



- Connectivity to external data sources enables quick document indexing by referencing existing case information without double-entry or introducing room for data entry mistakes

## Security Improvements

- Integrates with the organization's current security scheme
- Leverages the Convergence platform's built-in security features
- Roles are assigned to each user, so privileges are controlled when accessing the application
- End-to-end auditing capabilities with a complete and searchable audit log of all user activity

## Support for Legacy Data

- Integrations with current file repositories automate the collection of the backlog of thousands of documents and enable indexing and storage to sunset ad hoc or soft copy mechanisms
- Secure document repository holds hundreds of thousands of present and historic documents to satisfy legal and regulatory requirements on document retention and can be quickly retrieved for legal reasons
- Trinisys has extensive experience pulling and integrating data from government and third-party document solutions such as FileNet by IBM and Maximus

## Room to Grow

- MSDM has been developed to scale as the organization grows and onboards new members
- Countless document types and data fields can be added to properly categorize and classify documents
- The Convergence platform that MSDM runs on is fully capable of providing additional resources as the application takes on more capacity

- The application is currently being expanded to integrate with third-party document solutions (i.e. FileNet by IBM) to provide expanded access to documents in one place, while supporting client document retention requirements.

### **Trinisys Ongoing Support**

- Detailed training manuals and sessions are provided to each organization
- The MSDM application contains a “Help/Contact” button on every page of the application that can be clicked for more information. Users also have access to a shared mailbox to request direct assistance with a process established between client employees and Trinisys to appropriately address issues.