

# The Assistance Fund (TAF): Improved Patient Reimbursements, Document Parsing, and Customer Relations Management

## ORGANIZATION

Our client, The Assistance Fund (TAF), is an independent nonprofit patient assistance organization that helps patients and families facing high medical out-of-pocket costs by providing financial assistance for their copayments, coinsurance, deductibles, and other medical and health-related expenses. Since 2009, TAF has helped more than 160,000 children and adults obtain access to critical treatment for life-threatening, chronic, and rare diseases. TAF manages nearly 80 disease programs that cover all FDA-approved treatments. They have a GuideStar Platinum Seal of Transparency, a five-star GreatNonprofits rating, and an ImpactMatters-rated nonprofit.

*“We have built a strong relationship with the XTIVIA team and consider them colleagues and coworkers. We thoroughly enjoy working with them - there is mutual respect, and they are just as invested in the success of our organization as I am.”*

**Danielle Vizcaino**  
Senior VP - The Assistance Fund

## CHALLENGE

### AUTOMATED CLAIMS SYSTEM

For TAF, patients’ experience is a top priority. They realized that their legacy claims processing system needed upgrading. Their existing claims reimbursement process was tedious and time-consuming. When TAF recognized that it would be difficult to do this upgrade in-house, they brought in XTIVIA. In partnership, we designed a custom claims process flow to automate eligibility decisions. XTIVIA developed and implemented the solution with MuleSoft, which provides integration for data, applications, and devices on both on-premise and cloud computing environments.

**“XTIVIA was instrumental in this upgrade by mobilizing a MuleSoft developer and planning and executing the entire upgrade and data migration.” says Danielle Vizcaino.**

### MEDICAL DOCUMENT PARSING

TAF receives thousands of medical documents, and it was very time-consuming for agents to triage, review and map these documents to patients’ accounts - it would typically have taken days. XTIVIA designed and implemented a custom document parsing tool.

**“We were able to gain efficiency here, a tremendous time-savings for processing these medical documents,” - Danielle Vizcaino.**

## SALESFORCE CRM UPGRADE

While developing the claims and parsing tools, XTIVIA learned that TAF's Salesforce CRM hosting was outdated. XTIVIA upgraded their hosting package from Amazon Web Services (AWS) Classic to Lightning, providing superior usability and additional functionality without needing any code.

## TECHNICAL SOLUTION

XTIVIA improved accuracy and faster turnaround of TAF patients' medical reimbursements by:

- Upgrading and automating TAF's claims system
- Designing a visual process flow and implementing a custom claims
- Managing the migration, ensuring correct data and object mapping to the new system

XTIVIA improved accuracy and efficiency in TAF's document parsing and management by:

- Developing a custom document parsing system
- Eliminating a manual triage done by agents

## BUSINESS RESULT

TAF's new medical claims system produces reimbursements faster. Agents can answer questions easier and experience more straightforward navigation of the new claims system. This project eliminated manual document triage by agents, improving accuracy and productivity, which has saved valuable resources and time, improved accuracy, and saved cost.

## KEYWORDS/TECHNOLOGY

MuleSoft, Salesforce CRM, AWS Lightning Hosting, Medical Financial Assistance, Nonprofit, Guidestar, Health Insurance Claims, Medical Reimbursements, Document Parsing, Salesforce, CRM

## ABOUT XTIVIA

XTIVIA is a proven technology integration and innovation company known for delivering leading-edge technology solutions to our client's specific requirements, regardless of project complexity. We bring next-level business operations to reality through Application Development, Business Intelligence, Data Warehousing, Database Support & Management, Enterprise Information Management, Digital Experience Solutions, and Enterprise Resource Planning. Our success stems from a demonstrated ability to deliver deep expertise via professional services, empowering clients to leverage their chosen technology successfully, competitively, and profitably. XTIVIA has offices in Colorado, New York, New Jersey, Texas, Virginia, and India. [www.xtivia.com](http://www.xtivia.com)