



# Case Study: Compliance Services, Marketing Materials Audit

## CHALLENGE

A healthcare company needed to conduct an audit of the organization's Medicaid marketing materials to ensure they complied with requirements issued by the State of Indiana's Office of Medicaid Policy and Planning (OMPP). These materials, which were used to promote the organization's Hoosier Healthwise (HHW) and Healthy Indiana Plan (HIP) offerings, must be approved by the OMPP prior to distribution to members, providers, and some vendors. If these requirements were not met, the organization could incur financial penalties.

## PROBLEM

- Due to the volume and complexity of materials that needed to be reviewed, the healthcare company's internal compliance staff needed assistance to complete the project on time
- The healthcare company was in the process of transitioning to a new document repository system, which could impact the team's ability to access needed documents

## SOLUTION

Due to the company's past success with the client and our knowledge of Medicaid requirements, the healthcare company selected netlogx to manage the process of auditing their marketing materials.

The netlogx team:

- Established a schedule to review the more than 1,900 items, including advertising videos and print ads, included in the Master Medicaid Document Inventory (MMDI) list
- Provided project management oversight to ensure:
  - All items in the MMDI included the appropriate codes and the OMPP approval date
  - The documents included in the MMDI were not "red-lined," and the correct versions of the documents were loaded into the new document repository system
  - Any missing documents were identified
  - All other State of Indiana OMPP requirements were met



## SOLUTION (Continued)

- Reviewed each document on twelve (12) criteria and noted missing or incorrect information
- Identified other business groups/owners outside of the Marketing Department and updated the MMDI to reflect the added information
- Provided project status reports on a mutually determined schedule
- Produced a final report including a list detailing the missing or incomplete information, broken down by the twelve (12) review criteria

## RESULT

netlogx provided the client with information outlining the actions that needed to be taken to comply with State regulations. In addition, all required documents were successfully transferred to the new document repository.

## ADVANTAGES

The netlogx consulting team:

- Implemented project management best practices to deliver high-quality results before the project deadline
- Drew on their extensive Medicaid knowledge to identify areas of concern and identify the corrective action needed
- Created easy-to-understand status reports to provide information to project leadership
- Developed a comprehensive report detailing actions to be taken on each document
- Was able to complete the project with limited oversight, allowing the client's employees to focus on their key responsibilities