

Pharma-PBM – Past Project / Case Study

Project Title: Physician Clinical Review Automation on Pega Care Management

Project Type: Software Implementation

Industry: Pharma & Biotech

Business Unit: Information Technology

Duration: 12-months

Size of Organization: Large Enterprise

Function: Information Technology

Location: Remote / Global

Problem:

The client is a large Pharmacy Benefits Manager (PBM). Their legacy processes for conducting clinical peer-to-peer reviews were disparate and largely manual, with multiple collaboration tools and spreadsheets used to track workflow. Assigning work across many Physicians and Pharmacists was time consuming and often resulted in missed actions, frustrated employees, and poor overall experience for the client's members.

Action:

The direction was to implement Pega's Care Management framework and build an automated Physicians Clinical Review system. The solution would automate the workflow, including establishing an accurate registry of Physicians and Pharmacists, with their specialties, geo/license qualification, and availability to schedule and conduct reviews. The workflow also automated matching logic to connect the requested review with the proper parties based on the clear profiles and manage/track work queues.

Result:

The automated solution increased efficiency by 50-70% by reducing processing times. Data accuracy and workflow SLA notifications and alerts ensured no reviews were lost or stuck in the process, as would happen in the legacy process. The user experience was

intuitive and made training and user adoption smooth. Overall, the new solution has a measurable outcome, and greatly improved Physician, Pharmacist, and member satisfaction. This solution was selected to be showcased at PegaWorld 2025.

Deliverables:

1. Discovery Plan, Discovery Conclusions & Recommendations, Discovery Readout Presentation
2. Program Roadmap / Delivery Phases and Timeline (Sprint / Release Roadmap)
3. Business Requirements (Epics in Jira)
4. Detailed Requirements (User Stories in Jira)
5. Architecture / Design Framework
6. Unit Test Cases - documented with results
7. Test Strategy / Plan
8. Functional and Non-Functional Test Cases - documented with results
9. Automation Test Plan, Automation Scripts - documented with results
10. Security Test Plan - documented with results
11. Fully Tested (unit, system, integration, and UAT) Pega Application
12. Application Deployment Guide w/Operational Procedures, Troubleshooting
13. Governance / Status Presentation - comprehensive