The Organization: The United States Air Force Medical Service

As the “HMO that goes to war,” The United States Air Force Medical Service (AFMS) employs more than 40,000 full-time officers, civilians, and enlisted personnel plus an additional 20,000 members of the Air Force Reserves and Air National Guard. AFMS has a budget of $6.9 billion and runs 75 hospitals and clinics providing care to more than 2.6 million beneficiaries during both peacetime and wartime. Officer corps include: Biomedical Sciences Corps, Dental Corps, Medical Corps, Medical Service Corps, and Nurse Corps. Air Force Enlisted Medical personnel work in areas of medical administration, dental care, optometry, physical therapy, aeromedical evacuation, medical logistics, laboratory sciences, surgical care, and emergency care, among others.

The Challenge: Creating and Coordinating Policies and Programs

To complete its vision to “provide quality, world-class healthcare and health service support to eligible beneficiaries anywhere in the world at anytime,” AFMS must create and support seamless coordination across many organizational levels. States Lt. Colonel James Whitlock, Chief Knowledge Officer of the Air Force Medical Service, “we must approach crafting policies and procedures with great care. Delivering medical services at home and abroad requires the right team, tools, tactics, and strategy. This is especially true when sending our men and women into harms way.”

Whitlock continues, “creating policies can include many people from disparate directorates such as Financial Management, Health Care Operations, Medical Plans and Programs, Force Development, JAG, Modernization, and Congressional and Public Affairs. We must all work together to assign, draft, coordinate, and deploy policies regarding often highly visible, very complex issues in short periods of time. It’s a real team effort. Previously, we were using Microsoft Outlook Task and Microsoft Binder to divide, coordinate, and track requests as individual tasks. The solution did not meet our requirements. Tasks were often misrouted or lost. Participants did not have visibility across tasks because work resided in individual inboxes rather than one secure location. More importantly, senior management couldn’t see who was doing what. Accountability was problematic. Our challenge was a textbook case of a problem for BPM to solve.”
The Solution: SG/TASK for Automated Correspondence and Action Tracking

AFMS decided to move forward with a new “Correspondence and Tracking” application known as SG/TASK. Functional requirements included:

- Log correspondence received from internal and external sources
- Assign and route the correspondence to the Office of Primary Responsibility (OPR) and a specific Action Officer (AO) for follow-up action
- Assign due dates
- Route the correspondence response to one or more Offices of Collateral Responsibility (OCR) for review and feedback
- Provide coordination input
- Approve and sign the prepared response documents
- Add comments
- Attach documents in the task binder for routing to other AFMS offices or users
- Access comments and documents attached by other AFMS users
- Track the status of the correspondence items
- View the audit trail of active and completed (archived) process instances
- Report on correspondence processed with the application

AFMS worked with Evolvent, a small business based in Falls Church, VA to create SG/TASK. Explains Geoff Howard, Chief Technology Officer, “our job was daunting: high expectations, tight budget, critical needs, short timeline, and changing requirements. Thankfully, we had experience with the right tool – BizFlow® BPMS from HandySoft.”

Howard continues, “despite the opportunity to save money by building a tasking application from scratch, we recommended a COTS BPM tool because of the risks involved. AFMS needed to work fast and deliver a rock solid platform and framework on which to deploy and scale. Defining and designing process workflow is not just a series of Visio drawings. It involves complex rules, roles, and responsibilities. And considering that during any project requirements always tend to shift and change, process management tools must be flexible enough to quickly adjust to additional rules, sub-processes, and participants. For example, a key project stakeholder introduced a significant new set of steps several days before our scheduled launch. Because of the flexibility provided by BizFlow, we were not only able to meet his request by the end of the day, but also deliver a robust correspondence and action tracking application in two months. SG/TASK is used today by 500 officers, civilians, and enlisted personnel at USAF Surgeon General staff directorates in four locations. A successful launch like that is the result of a great team working with a great product.”
Value: Command and Control Visibility and Accountability

Says Lt. Colonel Whitlock, “we use SG/TASK to track all sorts of questions, issues, and tasks, but perhaps the best example is the coordination of policies and procedures. Consider our Aeromedical Evacuation mission. The US military operates in very remote locations. When an airman or soldier is critically injured overseas, an incredibly complex process is required to treat and evacuate them back to definitive care in the United States. Patients literally have their own personal Intensive Care Unit strapped to their stretcher. Just imagine who is involved, medical and surgical services, logistics, training, legal, finance, etc. SG/TASK was created so that personnel across the Air Force Surgeon General’s staff could quickly coordinate policies while never losing visibility into the task at hand.”

Whitlock explains, “senior managers really like SG/TASK because of its structured nature. A task is always assigned to an Action Officer (AO). After the AO drafts a response, the task follows a path in which each office in the AO’s chain of command concurs (or nonconcurs) with relevant comments. The path is flexible enough to allow all necessary AOs and subject matter experts to participate. Sometimes the ad-hoc nature of our workflow can include between two and 20 people. All participants have access to the full comment trail. AOs can track all of their work according to activity name, priority, status, and type. Every action on every task is tracked for accountability. Executives get the visibility they need and demand. They can view comments on every issue from all levels of their staff.”

Howard adds, “SG/TASK is built for scale and flexibility. We built the form in JSP and added single sign-on. We can auto-import changes to LDAP via Web services. We created a custom worklist email alert system that is ideal for nonconstant users. And we wrote WebDav functionality using the BizFlow API to manage attachments associated with each task. We plan to develop inbrowser editing and drag and drop file attachments. BizFlow came with ad-hoc task routing, which is tremendously important to SG/TASK since tasks don’t always follow a purely structured workflow. And we appreciate how BizFlow can work in a .NET framework, which is key to future development.”
Lessons Learned: Analysis, Training, and Knowledge Sharing

Whitlock shares, “an automated complex process is still a complex process. Complex processes entail complex business rules. These rules can be difficult to capture, refine, and lock down. Without properly defining and designing good rules, the BPM application built can ultimately fail. Furthermore, there is a balance between structure and flexibility. Where there is too much flexibility we see confused users and sub-optimized rule enforcement. Where there is too much structure, the application no longer supports the reality of business operations. Third, training is key. We do a 30-minute overview brief during half-day newcomer’s orientation sessions, a one-hour advanced training session offered monthly, and just-in-time-training via the Web. Finally, the application must support knowledge sharing. The ability for any user to look up any task enables knowledge building and encourages knowledge sharing. Our goal with SG/TASK is not only to automate tasking, but also capture what today is only found in people’s heads. SG/TASK facilitates knowledge sharing, and as a result helps us over time create a smarter, more nimble team.”

About HandySoft Global:

Since 1991 HandySoft Global has provided BizFlow® Business Process Management software and solutions to hundreds of organizations worldwide. Proven to reduce costs while improving quality and productivity, BizFlow® is an award-winning BPM suite of tools used to model, analyze, automate, monitor and optimize business processes.