DATAGENIX

Claims Modernization Readiness Checklist

A platform change often brings hidden process gaps and system dependencies to the surface.

Use this checklist to assess how well your organization understands its current environment and whether it is prepared to manage a modernization initiative.

Assess Your Readiness

Operations

- [ ] We can identify where manual routing, duplicate entry, offline tracking, or repeated follow-up adds unnecessary work.
- [ ] Our documented workflows reflect how claims are processed today, including exceptions and specialized cases.
- [ ] We can distinguish platform limitations from issues created by internal policies or processes.
- [ ] We have reliable baseline measures for processing time, rework, exceptions, and staffing effort.

Technology and Data

- [ ] We have a current inventory of systems, integrations, spreadsheets, file exchanges, and vendor-supported processes.
- [ ] We understand which critical business processes depend on third-party vendors or manual coordination.
- [ ] We know the purpose, owner, data source, and downstream use of each essential integration.
- [ ] We understand where claims data is stored, how historical records are accessed, and which issues could affect migration.
- [ ] Reporting requirements are based on the decisions teams need to make, not only the reports they use today.
- [ ] Teams can access accurate operational data without manually combining information from multiple systems.

Organizational Readiness

- [ ] Leadership agrees on the operational problems modernization should address.
- [ ] Decision authority and responsibility for requirements, testing, and implementation are assigned.
- [ ] Subject matter experts can participate without disrupting day-to-day claims operations.
- [ ] Teams are prepared to improve outdated workflows rather than recreate every current process.

Implementation Planning

- [ ] The first implementation phase has a defined scope, including the functions, clients, or claim types involved.
- [ ] Planning accounts for data validation, testing, training, transition work, and issue resolution.
- [ ] Platform requirements reflect future volume, client needs, and administrative complexity.
- [ ] Launch approval criteria are defined for data, workflows, integrations, and user access.

My Organization Checked:

15-18 Boxes

MODERNIZATION READY

Your organization has completed much of the groundwork needed for platform evaluation.

Address any remaining gaps before finalizing requirements or implementation scope.

9-14 Boxes

BUILDING THE FOUNDATION

Planning is underway, but unresolved dependencies could affect platform selection or implementation.

Assign ownership to the unchecked items before advancing.

0–8 Boxes

START WITH DISCOVERY

Begin by documenting current operations and mapping your technology environment.

These steps will give your team a stronger foundation for evaluating potential platforms.

DataGenix helps claims organizations evaluate their modernization readiness and explore how a connected platform can support future growth.

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Continue Your Modernization Assessment

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