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Navigating Complexity: The Journey to HITRUST Certification in Healthcare Payer Systems

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Introduction

A large healthcare payer, grappling with a complex claims processing system, faced the challenge of aligning HITRUST certification with SOC2 requirements while inheriting elements from service providers. The existing infrastructure, comprised of both mainframe and more modern server models, presented compatibility issues with HITRUST control language. With a transition just before certification from a traditional data center to a cloud-based model, translation of controls to a cloud environment, ensuring proper transition implementation and timeline-based model exacerbated these challenges of understanding and relating HITRUST control language to the operational workings of the systems in scope.

Rigid Timelines

Two factors compounded the urgency of a standard HITRUST certification timeline: 1) A system scope of 7 claims and supporting applications required involvement from multiple teams within and outside the organization. The challenge of working across large organizations while meeting defined milestones was apparent. 2) The transition to the new cloud data center occurred during remediation. With a set HITRUST anniversary, there was no leeway in the timelines for the payer to transition the data center and complete implementation or for the data center to provide appropriate evidence of implementation. Delays posed a serious risk to a possible lapse in certification.

Collaboration with Third Parties

Collaboration was key, not just within the payer's team but also with third parties. Engaging with a third party for control evidence outside of the HITRUST inheritance program demanded delicate orchestration and persistent follow through. Moreover, aligning efforts with another assessor, leveraging evidence from a SOC 2 Type 2 assessment, was paramount to ease the evidence collection burden on the payer and meeting established timelines.

The Solution

Scoping, utilizing program and project management as well as engaging deep subject matter expertise proved critical to success.

Comprehensive Scoping Discussions

In-depth discussions were conducted to understand the work executed by previous other third-party assessors on the SOC2. This involved translating their work into a format compatible with ongoing efforts. We also aimed to gain an in-depth understanding of the payer environment to ensure we provided proper and relevant guidance throughout the engagement as well as to engage the right project teams and subject matter experts.

Strategic Program and Project Management

A meticulous approach to program management was utilized, internally aligning various project timelines, and closely coordinating with the payer's team and each third party to ensure adherence to deadlines.

Direct Collaboration with Third Parties

Extensive communication and collaboration with a third party was essential to gather the requisite information and evidence to support their control responsibilities. It entailed not just securing information but fostering a channel of robust communication between the third party, the payer, and all stakeholders, ensuring no crucial detail was lost in translation. The same is said for communication across this large organization with multiple functional teams. The continuous flow of information between all involved parties was a critical success factor.

Expert Guidance

The complexities demanded not just effort, but expertise. Subject Matter Experts (SMEs) became trusted counselors, translating complex jargon into digestible insights for the payer's team. Given the varied technical complexities of the scope of the assessment (e.g., mainframe technology, cloud implementation, etc.), Meditology SMEs were critical for not only this translation, but also for decoding intricacies within the scope of the assessment.

The Results

This case study in achieving HITRUST certification—within the demanding confines of the timeline, budget, and various complexities, illuminates the need for strategic planning, collaborative synergy, and the invaluable impact of specialized expertise in navigating the intricate realm of HITRUST certification for a national payer organization.