Charter Management Implements DataCare's Platform for Massachusetts Utilization Review

Executive Summary

Charter Management Company's Utilization Review division implemented DataCare's Utilization Review platform to replace a legacy system that had supported Massachusetts UR operations for more than two decades. Charter Management's UR services the Atlantic Charter Group of Workers' Compensation carriers, operating within one of the most highly regulated Utilization Review environments in the country. Charter required a solution that could preserve established workflows, maintain audit integrity, and support compliance without disrupting daily operations.

DataCare partnered closely with Charter's IT and Utilization Review leadership to conduct a detailed requirements analysis, configure workflows aligned to Massachusetts regulations, and support user adoption across clinical and administrative teams. The result is a modern, centralized UR platform that supports regulatory confidence, operational consistency, and long-term adaptability for Atlantic Charter Insurance Group's workers' compensation operations.

Client
Charter Management Company, Utilization Review Services division
Boston, Massachusetts

Solution
DataCare Utilization Review Platform
DataCare Corporation

Context and Background

For workers' compensation organizations operating in Massachusetts, Utilization Review is both a clinical responsibility and a regulatory obligation. Systems must consistently support statutory timelines, defensible documentation, and audit-ready workflows under continuous operational use.

Charter Management operates the Utilization Review program supporting claims across the Commonwealth of Massachusetts, processing several thousand UR requests annually within a highly regulated environment. This function plays a critical role in supporting timely, compliant clinical decision-making and maintaining regulatory confidence for the Atlantic Charter Insurance Group.

For more than 20 years, Charter relied on a custom-built, on-premise Utilization Review system that was approaching end-of-life, with vendor support being phased out. Continued reliance on this system would have introduced increasing risk to regulatory compliance, audit readiness,

system stability, and long-term operational continuity. Replacing this mission-critical system without disrupting established workflows or introducing compliance risk became an executive-level priority.

A primary consideration throughout the evaluation process was whether a new platform could accommodate Charter's established workflows and regulatory obligations while preserving operational continuity and audit confidence.

The Challenge

Charter's Utilization Review workflows had been refined over many years to meet Massachusetts-specific requirements, including defined review sequences, appeal handling, documentation retention, and audit reporting. Any replacement system needed to accurately support these requirements while integrating with existing claims systems and inbound document channels.

At the same time, Charter's Utilization Review team consists of experienced clinical and administrative professionals whose primary responsibilities are centered on regulatory compliance, clinical decision support, and case processing. Charter emphasized usability, consistency, and structured implementation support to ensure the new platform fit naturally into established workflows and minimized operational disruption.

Charter was not seeking a generic UR solution. The organization required a platform that could be configured to reflect existing regulatory processes and operational decisions, allowing Charter to retain ownership of how work is performed for the Atlantic Charter Insurance Group's broader claims ecosystem.

DataCare's Implementation Approach

DataCare worked with Charter to conduct a structured business analysis process involving Charter's IT leadership, Utilization Review management, and operational staff. These sessions focused on documenting current-state workflows, regulatory considerations, audit requirements, and system integration needs.

Rather than relying on assumptions or predefined templates, DataCare's team invested time in understanding how Charter's UR operations functioned in practice, including how cases move between roles, how exceptions are handled, and how documentation is reviewed during audits. This level of detail informed configuration decisions and reduced the need for workarounds or post-implementation adjustments.

Based on this analysis, DataCare configured the Utilization Review platform to support Charter's Massachusetts UR processes, including intake and indexing, nurse review, peer review escalation, appeals handling, determination documentation, and outbound communications.

Particular attention was given to maintaining traceability of user actions, dates, and decisions to support audit and reporting requirements.

User Enablement and Adoption

To support a smooth transition, DataCare emphasized user enablement throughout the implementation. Training sessions were structured around Charter's established workflows and terminology, reinforcing continuity between prior processes and the new platform.

DataCare remained engaged as Charter users validated workflows and raised questions during testing and early use. Requested changes were reviewed and addressed through configuration updates where appropriate, supporting adoption while maintaining alignment with regulatory and operational expectations.

Client Feedback

Following implementation, Charter's Director, Information Systems Group, Anant Joshi, provided the following feedback:

> "The entire team we worked with made every effort to understand our requirements and fulfill them as best as possible. They were open to listening to our users and adapt the Ahshay platform to their needs, this is quite unlike most vendors who are rigid and unwilling to even consider that client requirements may benefit their products. The team on our project was very patient with our end users, who are non-technical."

Outcome

With DataCare's Utilization Review platform in place, Charter Management operates within a centralized, supported system aligned to Massachusetts regulatory requirements and established internal workflows. The platform enables consistent handling of UR intake, reviews, determinations, appeals, and supporting documentation across the organization.

For the Atlantic Charter Insurance Group, this implementation reduces long-term operational risk associated with unsupported legacy technology while preserving audit readiness and regulatory confidence. Leadership gains improved visibility into Utilization Review activity and process consistency, while the organization retains flexibility to adapt workflows as regulatory guidance, internal processes, or business priorities evolve.

Summary

This engagement demonstrates the importance of aligning technology modernization initiatives with established regulatory workflows and operational realities. By focusing on detailed

requirements analysis, collaborative configuration, and user-aligned adoption, DataCare supported Charter Management's transition to a modern Utilization Review platform while maintaining compliance confidence and operational continuity.

Organizations operating in highly regulated Utilization Review environments face similar challenges around legacy systems, audit readiness, and operational continuity. To learn how DataCare partners with organizations to modernize Utilization Review workflows while preserving compliance and established processes, contact DataCare to schedule a discussion.

About DataCare

Headquartered in San Jose, California, DataCare delivers configurable, cloud-based workflow platforms for the workers' compensation and managed care industries. DataCare software is designed to accommodate specialized operational and regulatory requirements.

DataCare platforms support utilization review, case management, and document management workflows, providing clear visibility into case status, quality, and workload management.

Contact DataCare

866-834-2334 | dcsales@datacare.com | www.datacare.com