

CASE STUDY THEME:

Happy client for 6+ years now. Customized configuration around very complex client-specific benefit rules for employees, spouse, retirees and grandfathered classifications. Also delivered last minute ACA solution.

Industry: Municipality

of Employees: 1,300

BUSINESS CHALLENGE

- Highly complex municipality with complex contingency logic regarding spousal benefits and various levels of retiree benefits. Client has non-standard benefit rules that must be correctly applied across multiple classifications of employees and dependents. Examples include HSA funding, life insurance benefits, core and buy-up disability offerings, multiple waiting periods and variable hour employee groups that present administrative and communication challenges.
- Client initially did not purchase our ACA services as they intended to use their payroll system to manage ACA. However, 3 days before filing deadlines, client called upon WBD for help generating forms, e-filing

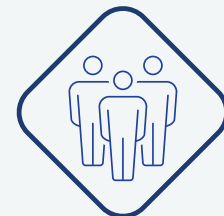
SOLUTION DELIVERED

- The WBD core package includes our supersite, ben-admin, COBRA, and ACA package, WBD brought one of our preferred exchange carrier partners in to help subsidize and contain costs.
- By working with the carrier, broker and client, we increased participation by 22% on voluntary benefits – which helped fund the ben-admin solution.
- As described above, client did not initially subscribe to our ACA package. However, when they realized their payroll system was going to miss the IRS deadlines, they called WBD and we were able to deliver for them! Within a 3 day time period, WBD back-filled historical ACA data from the medical provider, generated 1095 and 1094 forms, E-filed with the IRS prior to the deadline, and mailed all forms to all employees.

IMPACT CREATED



3 days to load prior year's ACA until WBD E-filed successfully with the IRS on client's behalf



1,300
employees



54 employee classifications, iterations and eligibility possibilities