

CASE STUDY:

Locked Out, Live in Three Weeks

Workforce Junction comes through when an advisor partner's new client's access to their enrollment system was shut off by their prior broker.

Workforce Junction's implementation and new client onboarding team and processes were put to the test. We had to gather current census and enrollment data from multiple carriers, validate and verify the data, set up the plans and employee communications, and present the system for employee self-service, all within three weeks.

Client Quick Facts



- 700+ employees, 25 locations
- Employees who move in and out of eligible status
- Large number of hires, terminations and rehires



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Opportunity / Challenge

WFJ's broker partner was chosen as Advisor for this client. The incumbent advisor was the licensee for the Ben Admin platform used for the client. That advisor shut off access to the system immediately on knowing the client's decision to switch their advisor.

WFJ was required to onboard the client and ensure no disruption in this transition, with no access to the data and set up information of the prior platform. If WFJ did not respond to this challenge, the alternative was for our broker partner to surrender to the incumbent; the client would not be able to switch. Client requirements included interfacing with the payroll system already in place to ensure employee data integrity, and tracking eligibility of part time employees.



Solution

WFJ team got into action immediately and worked with the client and the advisor to gather enrollment data from multiple carriers; the team validated this data with payroll and populated Benefits Junction with the most current enrollment information for all employees. The system was set up and went live in a three-week period.

- Time available for implementation was very short to minimize the disruption to the employer and employees between pay cycles.
- Prior system was shut off for the client, so data had to be collected from multiple carriers
- The system was set up, tested, and rolled out to employees for self-service in about three weeks.
- Payroll deductions were back on track, reported from Benefits Junction from the second pay cycle after the prior system was shut off
- WFJ implemented an integrated platform and administrative solution including robust communication and education plus a call center (The Benefits Desk) to provide employees with excellent support
- A 'big company' experience was delivered through custom branding of all employee facing systems, more customized user experience than the previous solution



Outcome

Smooth transition to the new platform ensured by providing telephonic support to employees during the transition period.

The first Open Enrollment on Benefits Junction came seven months after the initial transition. Over 95% of employees eligible for benefits completed enrollments online

