

PEGA IMPLEMENTATION CASE STUDY #2

EARLY RETIREE REINSURANCE PROGRAM (ERRP)

Situation The Early Retiree Reinsurance Program (ERRP) provides reimbursement to participating employment-based plans for a portion of the costs of health benefits for early retirees and early retirees' spouses, surviving spouses, and dependents. The program was authorized in the Affordable Care Act to provide financial assistance to health plan sponsors that make coverage available to millions of early retirees and their families – including for-profit companies, schools and educational institutions, unions, state and local governments, religious organizations and other non-profit plan sponsors. The ERRP program required the development of a case management system to support plan sponsor interaction with the ERRP Center—allowing users to transmit information related to retirees and other covered individuals and to determine plan eligibility. Key tasks for this project included development, testing, and implementation of the ERRP portal. Visual Connections, as a subcontractor to VIPS, a General Dynamics Company, provided implementation and configuration services for the Pega application.

Challenges This project required complex user identification and validation processes be built into the system. It also required the accommodation of over ten unique service action types, and the functionality needed to operate from day one. It required the capability to receive and process email requests from the plan sponsor community, and automated response generation was required based on the application of complex business rules.

Solution Visual Connections' Pega engineering team was directly responsible for implementing:

- Business flows to support the application Extract, Transfer and Load process
- Plan sponsor and user registration, verification and validation processes
- Business rules for processing email requests

- Application approval processes
- Payment release processes
- Other automated and manual verification processes

In total, over 40 automated processes were implemented, together with 7,500 custom rules.

Ongoing work by our senior Pega developers has included building out the development and production environments, installing case appeal rules, modifying case appeal workflow to incorporate appeal sources and reasons, adding appeal status reporting, and modifying Pega to be compliant with Section 508. We are additionally responsible for performance testing/tuning, creating training materials, and creating custom reports.

Results The Visual Connections' team of Pega experts built and operationalized the customer support application within a record time of 10 days. Because of our propensity to respond quickly and without fail, the customer and teaming partners on this project, acknowledged Visual Connections as the “key to success” and nicknamed us as the “Pega SWAT team.” To date, over 800,000 cases have been processed using the Pega system Visual Connections implemented.

Relevance to UPIC Case Management

- Complex verification and processing requirements
- Required 7,500 custom rules be implemented
- 800,000 cases processed to date