Glass Half Empty or Glass Half Full?

Alex Moral
Senior Vice President

This age-old quandary boils down to the perception of the one viewing the glass. I’ve been thinking a lot about this question recently in light of the concerns many in the division are expressing about the number of people leaving VBS to go to work for our competitors. Read full story.

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Glass Half Empty or Glass Half Full?

This age-old quandary boils down to the perception of the one viewing the glass. I’ve been thinking a lot about this question recently in light of the concerns many in the division are expressing about the number of people leaving VBS to go to work for our competitors.

It is an issue in our division right now and I don’t want to shy away from talking about it. Many are wondering if the people who left were privy to information about the company that they don’t know and have abandoned the ship before it sinks. But it’s also an issue that I’m not worried about and here is why.

First, to alleviate your concerns, I want to assure everyone there is nothing wrong with our business. VBS is as strong, if not stronger, than it has ever been. Even though we will miss our plan for the year, we continue to be more profitable than any other Trustmark business. Our strategies and value proposition are solid, and competitors trying to take people from us validates that.

Having valuable team members leave the company does affect us, but it doesn’t mean it reflects poorly on the organization. The fact is people are leaving because a lot of new companies are jumping into the voluntary space, and our competitors are attempting to get a stronger foothold in the market. Because of our good reputation, our people are being approached by companies offering sweet incentives to entice them away.

Here is where the glass half-full or half-empty analogy applies to Trustmark. Is it a good thing or a bad thing that other companies want our people? I take the glass half-full approach and believe we must be doing something right that other companies are trying to take people from us. Our strong relationships with our partners speak to our value proposition, and how strong and valuable it is. And even though I’ve always said our brand
is our people, a few people leaving doesn’t change the culture of the business or our commitment to our value proposition.

You may ask, "Won’t people who leave take their knowledge and relationships with them and won’t this hurt Trustmark?” Yes. People may take what we do here and try to implement it into a competitor’s culture, but that doesn’t mean our ideas and approach to business will necessarily succeed there.

While the Sales team has lost some very productive Regional Sales Directors, many of their broker relationships have stayed with us. For example, Scott Borden, who left Trustmark in October, was a big producer for us, but his main broker, Alexander and Co., is committed to staying with Trustmark. In fact, Alexander just wrote two new cases with us in spite of the fact that the RSD left. This proves that our relationship remains strong.

The departure of some highly productive individuals may have temporarily slowed us down. However, this is an opportunity to make some adjustments, including strengthening the quality of the people we hire. By making smart hiring choices, we’ve raised the overall quality of our RSD team. As a growth business, the key for us going forward is to make sure we are providing the proper sales support and onboarding so our new RSDs can be more productive team members soon.

Looking ahead, our plans for 2012 reflect the newness of the sales team and we have adjusted our sales plan accordingly. Because we see the glass half full, we will continue to invest in the business, including pursuing the replacement of our policy administration system and keeping an eye out for opportunities in the marketplace.

Have a happy and safe holiday season.

Alex
The Journey to Great Destinations Continues

Travel unlocks the mystery to places we have never seen. Great Destinations – your go-to place to learn more about the division’s strategic initiatives – has provided us with a roadmap and helped us maneuver through some roadblocks along the way as we explore new unchartered territory.

While we provided updates on specific initiatives to keep you fueled until the next destination, we cannot ignore the fact that some initiatives have met some speedbumps. Why? Like many new journeys, there will be delays, re-routing and roadblocks along the way. However, that is when we consider altering our plans or making different arrangements. The same method is used for our strategic initiatives.

Strategy is all about the approach we take to arriving at our destination. While some of our tactics have changed, our accomplishments have paved the way for future success.

We hope you have increased your knowledge of the strategic initiatives and are eager to continue your trip through Great Destinations in 2012. As the final educational but fun event on Nov. 16 wrapped up our journey through 2011, the team already has an event in the works to captivate and educate employees early in 2012.

Please take time to thank the team behind the scenes of Great Destinations: Sam Dennis, Dina Matson and Paula Poda in Corporate Communications; Wendy Devine, Aliza Flores, Nadine Mitchen in Mequon; and Kelly Marie McGrath in Worcester.

Looking ahead to 2012, we will review our successes and lessons learned, and brainstorm for new ways to communicate information to you about our strategic initiatives. If you have any feedback about Great Destinations or are interested in participating in the Communications Strategy Team in 2012, please contact me at ext. 45409 or
Solutions@Work is a quarterly publication for employees of Trustmark Voluntary Benefit Solutions.

For comments or questions, contact Carilyn Carlson.

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Project Management Update

Trustmark Voluntary Benefit Solutions’ 2011 projects continue to advance forward toward execution or completion. Below is an update on a key project to keep VBS team members abreast on the latest project information.

Critical Illness Subsequent Riders Project

The Critical Illness Enhancement Project is an important project because it updates the current CI product with multiple payouts, which helps make VBS more competitive in the marketplace. Todd Woodson, Director, Project Office, said the project continues to meet the plan to allow new business enrollments the first week of December. This involves close coordination by the project manager and the Notepad team with the benefit administration systems vendors. The project will continue into the first quarter of 2012.

For more information, check out the "Critical Illness Innovation Project Advances Toward Completion" article.
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For comments or questions, contact Carolyn Carlson.
A Snapshot of the South Carolina School District Case

Supporting a large case is never an easy task. But getting one ready for the fall reenrollment period brings unique challenges to the VBS Sales Implementation Team.

The South Carolina School District, which is one of VBS’ cases, reenrolls with Trustmark annually. It includes 22 individual school districts with about 54,000 benefit eligible employees. In just four years, the case has grown from 12 school districts mostly through broker word of mouth. The month-long enrollment period wrapped up Oct. 31 with a Feb. 1 effective date.

The case generates about $3 million in submitted premium annually for Regional Sales Director Dave Edwards. For the producer for the case, Ward Services, the South Carolina schools represents the majority of its $25 million block of business with Trustmark, or 10 percent of VBS’ operating revenue.

“The fall is the busiest time of year for sales implementation and other departments,” said Brent Buckland, Second Vice President, Sales Implementation. “The case involved a lot of front-end consulting with Ward Services, sharing analytics with enroller data and creating enroller incentives to help improve the results of the case year over year. Dave Edwards and Ryan Paddock went out on visits and came up with a strategic plan of action.”

One of the biggest challenges in implementing this case is getting all Trustmark systems, especially the Notepad system, “set up and ready to integrate with Ward Services’ enrollment system,” said Ryan Paddock, Senior Account Executive, Worksite Sales Support. “They also have to default their e-mail and passwords through our Notepad Enrollment System so there is a standard password for every enroller, and the e-mail goes back to Ward Services.”

Buckland said the case is complex because it is greater in scope. “There are more moving
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Paddack said in addition to Sales and Implementation, the reenrollment included huge contributions from the Notepad enrollment team, Underwriting, Commissions and Licensing, New Business, Customer Service, Billing, Claims and the Group Implementation teams.
Delighting the Customer

Trustmark Voluntary Benefit Solutions has a history and reputation for providing superior customer service. It’s one of the company’s value propositions, and one of the things VBS does best.

Often, VBS associates are called upon to do what others consider “above and beyond” customer service. But for Trustmark, it’s all in a day’s work. Below are two recent examples of VBS employees showing how much they care, and how they take caring for customers seriously.

Paulette McGuiness, Associate Benefits Adjustor

VBS received a handwritten card thanking Paulette McGuiness, an Associate Benefits Adjustor in Worcester, for the outstanding service she provided to an insured. According to John Dembowski, Associate Director, Worcester, the insured was very ill so McGuiness had to work with the woman’s husband, who was very anxious and concerned about his critically ill wife.

In the card, the insured highly praised McGuiness for being “very compassionate and patient” with her husband, and said McGuiness’ kindness, “especially to my husband, was unbelievable.” She added, “If all your claim representatives used Paulette as a role model, your company couldn’t be beat!”

Dembowski noted that many times the personal side of what Trustmark associates do day in and day out is overlooked by considering the amount of payments processed in a certain amount of days, or the amount of mail. However, he added, "It is service like this that our customers really appreciate, and as a company we can’t overlook the long-term effect it
Nancy Seibert, Senior Benefits Adjustor

VBS received an e-mail on Aug. 2 from Creative Worksite Solutions regarding a claim for benefits under the Accelerated Death Benefit Rider for an insured who was terminally ill with less than four months to live. Senior Benefits Adjustor Nancy Seibert worked with the enrollment company to obtain a completed claim form via e-mail to ensure prompt handling.

Tammy Fisher, Director, Operations, said VBS received the claim form and swiftly sent it to the Medical Director for a rush review. “The review was promptly handled and the claim was paid on Aug. 4.” The enrollment company responded, “I cannot thank you enough for the tremendous service provided to our client.”
New Resource Lending Program Brings Relief to Busy Departments

The last quarter of the year is a busy time for the New Business Department. The workload triples. The demand for overtime increases. And the hiring of temporary workers is normally what’s needed to get the work done. But reducing expenditures on overtime and the hiring of temporary workers is one of the financial controls goals within VBS for 2011.

The team has a staff of 21 employees, but the number of New Business employees needed to process the work during this peak time is 39. However, this year, help will come in the form of the new VBS Resource Lending Program.

Resource Lending is a pilot program designed to share resources within VBS. With no surplus of employees or floaters within the division, the VBS Resource Lending program is expected to take the heat off departments during peak times as well as provide fill-ins for when employees take vacations and personal leaves.
With Resource Lending in place, New Business expects to have one temporary worker within the department instead of four or five. The expected savings within the department by year-end will amount to about $30,000.

The pilot began last April so the program could be tested, running and ready for action before the division's busiest time of the year. While some companies are gearing down in the last month of the year, VBS operations gears up to process applications, reconcile premium, and maintain an increased level of service for customers purchasing voluntary coverage through fall enrollments.

“The program has given us added flexibility to react more quickly to immediate staffing needs as peaks in work occur,” said Scott Lau, Executive Sponsor of the project.

To get the program off the ground, monthly brainstorming sessions were held with Directors Kathy Kirk, Tammy Fisher and Associate Director Kathy Torres to come up with a process for the program. Together, they streamlined job descriptions for specific tasks so the training period would be minimal for employees. Once the criteria for the program were established, a bank of employees who could share some of their time was selected. The bank currently includes 29 employees.

“Our communication efforts focused on cross-training, volunteering and opportunities to learn the work of other departments. A culture change started to evolve,” said Kirk. “Employees wanted to enhance their skills and learn more about other departments. Now we have a bank of resources we can call on in our time of need.”

The job functions employees could be called upon to assist with vary depending on the complexity and training required, but may include scanning, data entry, working with claims, answering customer calls, recording proxies for the annual board meeting, auditing application batches, and policyholder service.

“The program has given us added flexibility to react more quickly to immediate staffing needs as peaks in work occur,” said Lau.

The Resource Lending directors will meet to review the program, survey the participants and broadening it to include additional departments. A cost benefit analysis will be made to determine the success of the project.
To volunteer or learn more about the Resource Lending Program, please contact Kathy Kirk at ext. 33059 or kathy.kirk@trustmarksolutions.com; Tammy Fisher at ext. 34153 or tamara.fisher@trustmarksolutions.com; or Kathy Torres at ext. 45457 or kathleen.torres@trustmarksolutions.com.

Look for more information about these two initiatives soon on the Great Destinations site on the Virtual Water Cooler.
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Setting the Standard for Service
Third Quarter Service Report Card

Results for the third quarter showed that Voluntary met 20 of the 20 goals in the nine key service categories that customers value most. These measures illustrate and reinforce the division’s commitment to service by demonstrating how Trustmark leads the industry in its responsiveness to its customers’ needs.

In this issue of Solutions@Work, the spotlight is shining on:

Customer Service Calls:

<table>
<thead>
<tr>
<th></th>
<th>3Q 2011</th>
<th>Goal Met/Exceeded?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Answer Speed</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goal: 30 seconds or less</td>
<td>19 sec.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Abandon Rate</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goal: 5% or less</td>
<td>2%</td>
<td>Yes</td>
</tr>
</tbody>
</table>

This goal is crucial because:

“It is important that we answer calls within the established goals as this demonstrates to our customers just how important they are to us,” said Tammy Fisher, Director, Operations. “We are here to provide excellence in service and it is proven by the speed in which we answer their calls, the knowledge of our staff, the attention we give to the customer’s issue and the swiftness of the resolution.”
**Surveys Giving Customers a Means to Have Their Say**

VBS is continuing to conduct paper and electronic surveys as part of the 2011 service performance initiatives to get customer feedback and to develop future service initiatives.

The purpose of the surveys is to report and measure customer loyalty, staff knowledge and professionalism, identify areas for improvement, preferred methods of communication, and solicit suggestions from customers.

Throughout 2011, the project team surveyed beneficiaries and policyholders, brokers and agents, and new and existing employers. In 2012, the project team plans to survey Worcester Claims customers electronically, as well as update the Buyer Satisfaction Survey currently sent out with policy contracts.

Based on preliminary survey results so far, VBS customers appear to be satisfied with service, but there are areas that need improvement to help increase customer loyalty.

"Our survey process is still in its infancy, and we are continuing to analyze our survey methods to improve our overall response rates and results," said Matt Whalen, Executive Sponsor of the project. "We will be tweaking the current surveys to a more standardized approach, and continuing to review customer feedback to ensure we are providing our customers with the best possible experience."

The survey project team currently includes Executive Sponsor, Matt Whalen; Project Manager Carilyn Carlson; and business owners Tamara Fisher, Tom Conforti and Kathleen Torres. Watch for more information about the surveys in future issues of Solutions@Work.
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For comments or questions, contact Carilyn Carlson.

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Solution@Work Archive
Critical Illness Innovation Project Advances Toward Completion

As new enhancements to the Critical Illness product roll out for groups with Jan. 1 effective dates, the CI Innovation Project to come up with a new CI offering continues moving forward.

Marketing has conducted focus groups in Illinois and Georgia with four different audiences, including one attended by individuals who had experienced a critical illness, and another with caregivers. Additionally, sessions were held with Trustmark employees to learn from their experiences. Ideation sessions were conducted, which included case managers and employees who work with claims to learn what they hear when speaking to critically ill patients.

“We've conducted our research and ideation sessions, and have narrowed it down to a handful of needs for which Trustmark is in a position to provide a quality solution,” said Julie Pohjola, Product Manager, Accident and Critical Illness. “There are many opportunities for us to consider when you hear all the challenges people in this situation have. Through these sessions, we learned what their needs were and what would have helped them during their illnesses.”

Pohjola said the next step is to weed through the many ideas and find out what solutions
customers would value most.

“We had 30 or 40 ideas that emerged from these sessions, and narrowed them down to 10 or 15 that we plan to explore further,” said Pohjola. “In December, we plan to engage our research vendor to do some quantitative research to get the general market’s reaction. This is something we’ve never done before. Initial input on what customers value most will help us design a product that customers want and need.”

In the meantime, to make the current Critical Illness product more competitive, VBS has added several enhancements, including three new subsequent benefit riders that will be available to cases enrolling with Jan. 1 effective dates.

The enhancements, which offer more payouts under one policy, will be available to new cases offering the worksite CI product.

Look for more information on the Great Destinations site on the Virtual Water Cooler.
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Regional Scorecard
Through Oct. 31, 2011

<table>
<thead>
<tr>
<th>Regional Sales Director</th>
<th>YTD New Sales</th>
<th>Annual Sales Goal</th>
<th>YTD New Sales as % of Annual Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcia Oyster</td>
<td>$923,493</td>
<td>$825,000</td>
<td>112%</td>
</tr>
<tr>
<td>Mike Feeney</td>
<td>589,510</td>
<td>575,000</td>
<td>103%</td>
</tr>
<tr>
<td>Jay Weingart</td>
<td>2,258,759</td>
<td>2,475,000</td>
<td>91%</td>
</tr>
<tr>
<td>David Edwards</td>
<td>4,320,345</td>
<td>5,775,000</td>
<td>75%</td>
</tr>
<tr>
<td>Michael Sheehan</td>
<td>156,814</td>
<td>425,000</td>
<td>37%</td>
</tr>
<tr>
<td>Shaun Urista</td>
<td>54,785</td>
<td>300,000</td>
<td>18%</td>
</tr>
<tr>
<td>James Haboush</td>
<td>12,183</td>
<td>250,000</td>
<td>5%</td>
</tr>
<tr>
<td>Louis Gallucci</td>
<td>6,885</td>
<td>400,000</td>
<td>2%</td>
</tr>
<tr>
<td>Shaun Walti</td>
<td>8,708</td>
<td>750,000</td>
<td>1%</td>
</tr>
<tr>
<td>Todd Squiers</td>
<td>0</td>
<td>400,000</td>
<td>0%</td>
</tr>
<tr>
<td>Rodney Johnson</td>
<td>0</td>
<td>250,000</td>
<td>0%</td>
</tr>
<tr>
<td>Southeast</td>
<td>3,178,134</td>
<td>3,375,000</td>
<td>94%</td>
</tr>
<tr>
<td>Old South Central</td>
<td>411,090</td>
<td>525,000</td>
<td>78%</td>
</tr>
<tr>
<td>Plains</td>
<td>1,969,955</td>
<td>2,575,000</td>
<td>77%</td>
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</table>
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<table>
<thead>
<tr>
<th>Region</th>
<th>2023 Sales</th>
<th>2022 Sales</th>
<th>Percent Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Midwest</td>
<td>3,530,145</td>
<td>5,175,000</td>
<td>68%</td>
</tr>
<tr>
<td>NY/NJ</td>
<td>504,509</td>
<td>2,575,000</td>
<td>20%</td>
</tr>
<tr>
<td>Old Gulf Coast</td>
<td>18,346</td>
<td>575,000</td>
<td>3%</td>
</tr>
<tr>
<td>North Central</td>
<td>0</td>
<td>3,375,000</td>
<td>0%</td>
</tr>
<tr>
<td>Unassigned</td>
<td>5,950,089</td>
<td>4,625,000</td>
<td>129%</td>
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<tr>
<td><strong>Total Regional Sales</strong></td>
<td><strong>23,893,558</strong></td>
<td><strong>35,225,000</strong></td>
<td><strong>68%</strong></td>
</tr>
<tr>
<td>National Sales</td>
<td>8,222,347</td>
<td>14,600,000</td>
<td>56%</td>
</tr>
<tr>
<td>Duane Holder (PFP)</td>
<td>8,204,000</td>
<td>9,900,000</td>
<td>83%</td>
</tr>
<tr>
<td><strong>Grand Totals</strong></td>
<td><strong>40,319,905</strong></td>
<td><strong>59,725,000</strong></td>
<td><strong>68%</strong></td>
</tr>
</tbody>
</table>
Over the course of the past year, the sales team has undergone significant change. We’ve added some talented new hires and said goodbye to some. We gained a great leader when David Schneeweis came former colleagues on board as Regional Sales Vice President in January. Schneeweis is currently working on building out his West Coast team. The East Coast team is working well, finding new cases and brokers. Our new Regional Vice President of the East, Jack Waldie, joined us in mid-November to lead the East Coast team and fill the two Eastern region vacancies.

Waldie has more than 20 years of insurance industry expertise, and his most recent position was Regional Vice President with Principal Financial Group. I am extremely excited about Jack joining our sales team. He will work closely with his Eastern regional sales team and me, along with David Schneeweis, Rae Egleston and our entire sales team to help Trustmark Voluntary Benefit Solutions grow and prosper.

Our new Regional Sales Directors – Rodney Johnson in the Gulf Coast Region; Todd Squiers in the Pacific Northwest; Louis Gallucci in the Mountain region; Shaun Urista in the South Central; Shaun Walti in Southern California; and Jim Haboush in the Southwest region – are all adjusting well. This is mostly due to the new onboarding process, which includes sales training on VBS products, and our billing and other capabilities.

The team is also benefiting from getting what I call “windshield time” with Schneeweis and other RSDs; getting assistance in the field from the Sales Implementation Managers, especially with product and process knowledge; getting help with LifeHealth and Wealth
from Rae Egleston and Ron Watt in the field, and the marketing team's expertise.

We are continuing to reinforce and build out our Three Pillars of Success, which are our stand-alone voluntary products, core enrollments and now LifeHealth and Wealth.

For the stand-alone products, we’ve enhanced our Critical Illness product, and are now ready for new case enrollments in approved states. Amazing strides in the technology area have benefited our core enrollments, allowing our sales people to gain more sales in that core space by using more benefit administrative systems.

The LifeHealth and Wealth initiative is doing two major things for the sales team: opening doors for brokers to listen to our “three pillar story” because it is unique in the market, and winning cases that allows us to have three pillars of success. Our three pillars of success put us in a more competitive landscape helping us in today’s competitive world of voluntary benefits.

I found it interesting in both the MetLife Annual Benefit Survey and the Special Brokers survey just published, all three of our pillars of success were listed as key items that brokers and employers are looking for. How’s that for confirmation that we’re on the right track?

We have new producers coming on board each day, and proposal activity is gaining steam. And that bodes well for 2012 sales. We plan to continue to seek out joint sales with other Trustmark divisions, and will work with them to bring cases to VBS.

As the year ends, I expect we will close 2011 with a bang. Looking ahead, the first quarter of 2012 looks like it will be a very strong start to the new year.

Click to download the regional sales map.
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Meet the Data Analysis Team
The Data Analysis Department, formerly Technical Support, is made up of three teams:
Document Library Science (DLS/XPression/eCor), PITECH (Personal Insurance Technical Support) and GroupFacts/ClaimFacts Support. The DLS team enters and maintains policies and certificates, eCor letters and Critical Illness, Accident, and Disability applications for the PFP business on the document management software (DLS or XPression). The PITECH team provides various reports such as monthly credit union billing files, custom in-force files for the Mequon office and commission reports. The GroupFacts/ClaimFacts Support team is responsible for coding the two systems and keeping them up to date. Currently, the Massachusetts Municipal groups, VGSTD, and the VGCI products are on these systems.

The DLS/XPression/eCor team

Data Analysis Team Goals

- Respond to production problems within 24 hours of notification.
- Work on projects as assigned to enhance VBS’ growth
- Deliver an accurate and legally compliant document to the client
- Ensure 98 percent accuracy in reports provided to internal and external customers
- Complete security requests within two business days of receipt
- Develop custom and dental plan coding within two weeks of request.
ensures document language complies with state and federal health insurance laws and regulations including HIPAA requirements. The PITECH team provides electronic premium and member data that can be e-mailed and loaded to customers files electronically, as well as reviews and/or automate manual jobs done in the business area. GroupFacts/ClaimFacts Support helps maintain integrity the of the GroupFacts/ClaimFacts systems and provides assistance to all VBS business areas, including providing the Worcester Office with claims support.

“Our teams are involved in every single project within the division because a document has to be created for every area of the division,” said Beth Baruffi, Director, VBS Technical Support, who leads the Data Analysis team. “We run reports to answer queries, such as how many applications or how much premium was received this month.”

Baruffi says she has two associates who do reporting and find ways to increase the business areas efficiencies. “They run over 200 reports on a monthly basis from credit union billings to Best Doctors eligibility files. They also perform large compliance-related mailings, including reenrollment letters.”

The team also has two full-time and one part-time Document Designers who are responsible for the maintenance of the contracts for the division and the correspondence in eCor, a Web-based application used by the VBS business areas. Another full-time associate supports and maintains the GroupFacts and ClaimFacts systems. Due to the closure in January 2012 of the dental line of business, Baruffi said this staff member is learning the xPression Document System so she can assist on the very large project of moving all the VBS documents from “older” documents systems to the xPression document system.

The Data Analysis Team supports the VBS value proposition by ensuring all documents are accurate and in compliance before sending them to clients, and all reports are accurate, complete and meet the clients’ business needs.