CONQUERING COMPLIANCE
How UNC did it in less than six months
The fun all began in August of 2015, when University of North Carolina (UNC) reached out to Maestro Health™ with a request for quotation (RFQ).

They were in dire need of ACA compliance services. As a public, multi-campus university system, encompassing 17 diverse, constituent institutions and other educational, research and public service organizations, it was clear they needed more than just a vendor – they needed a long-term partner capable of tackling their complex needs.

The RFQ process was incredibly competitive. With so much on the line, UNC had a detailed list of criteria they wanted to ensure their vendor could meet. At the top of their list was a technologically advanced, rules-based system that provided easy access to data for analysis and reporting purposes. Finding a partner who was flexible, transparent and responsive was also key in their decision making process. Needless to say, adherence to HIPAA rules and regulations was mandatory.

Working within a tight time frame, UNC enlisted the help of consultant Gruppo Marcucci to evaluate the RFQs they received. The process kicked off August 17 with a goal to begin implementation in mid-September and a targeted “go-live” date of November 1.
Building the dream team

In late October of 2015, it happened. UNC awarded Maestro Health with the contract and a partnership in ACA compliance was solidified. Thrilled to take on the challenge, the Maestro Health team quickly assembled and got to work to meet the December 31 IRS deadline.

Just one week later, Maestro Health paid their first visit to UNC to assemble their dream team: Sean Goheen, consultant at Gruppo Marcucci; Lisa Conza, area senior vice president from Arthur J. Gallagher and Company; Laura Couger, manager, ACA Services and Carol Rito, compliance officer, from Maestro Health; and key individuals from UNC — most notably, Maestro Health’s daily contact, Brian Usischon, senior associate vice president for human resources services.

Plan of attack

As a way to lay out the plan of attack, the team met with UNC to present a customized timeline and completed discoveries for all campuses. Several key considerations were noted during these initial meetings, including:

- An employee population of over 123,000, spread across 20 separate entities.
- A campus that included 16 universities and one public boarding school.
- 17 independent HR and Benefit departments.
- A total of 10+ data sources.

Clearly, everyone had their work cut out for them. To make things even more complex, the campuses were part of the self-insured plan administered by the state health plan of North Carolina. And, here’s the twist: UNC had a mid-year switch in their enrollment system/service provider, but when autumn rolled around, it was clear they needed to go back to their previous provider. This created unique problems, including gaps in coverage data and uncertainty of how they would consolidate 12 months worth of data.

Digging into the data

The first monster to deal with was the data. Weekly IT calls were put on the schedule between the Maestro Health EDI department and the individual UNC campuses. By mid-December, it was noted that different campuses were progressing at different rates, so meetings were then held on an as-needed basis.

The struggle was real. Campuses were consolidating data elements that had previously never been collected and were housed in multiple systems. Getting the data necessary from the enrollment service provider was rocky, which made it difficult for UNC to put together the accurate files needed to process their 1094-C and 1095-Cs.

Luckily, the Maestro Health team had Brian Usischon as an advocate on their side at UNC. He worked in collaboration with the Maestro Health team to keep campuses on track with the aggressive timeline. He communicated crucial deadlines and helped mitigate the slippage on the benefit data by being involved at the highest level with the third party provider. He also backed the decision for UNC to ask the IRS for a 30-day extension. Ultimately the extension wasn’t needed, as the IRS gave a March 31 extension to all companies. This was some much-needed relief to ensure all 21 EINs were accurately reported with the best possible data.
Crossing the finish line

All the blood, sweat and occasional tears were worth it. All 21 EINs were delivered not once, but twice. First, by meeting the March 31 deadline for 1095-C forms being sent out to all eligible employees (a final total of 76,619 employees). Second, by successfully transmitting all data to the IRS well before the June 30 deadline.

What was learned

Of course, many lessons were learned along the way. The Maestro Health team, from client services to product development, needed to work closely together to make this such a successful effort. Countless internal meetings were necessary to work through obstacles as they developed. Everyone owned the success and understood failure was not an option.

Staying open to client feedback (in this case it was really 20 different clients) was crucial. The ability to pivot when necessary with moving deadlines or shifting expectations was very important. Having an internal client advocate, who was well respected, was invaluable to keeping the project on track. And remembering that Maestro Health was in this for the long haul with UNC as their partner was essential.

“We found a true partner in Maestro Health...opting for this solution is one of the best decisions we've ever made.”

- Brian Usishon,
  senior associate vice president for human resources services

Want to learn more? Let’s talk.

Phone: 312.517.3500
Email: info@maestrohealth.com