

## J.P. Farley Corporation leaps into the modern age and lands a large new client utilizing the highly scalable, cloud-based solution, VBA.



29055 Clemens Road  
Westlake, Ohio 44145

**Phone** 800.634.0173

**Fax** 440.250.4301

**Email** [benefits@jpfarley.com](mailto:benefits@jpfarley.com)

**Website** [www.jpfarley.com](http://www.jpfarley.com)

J.P. Farley Corporation founded in 1979 by Jim Farley, current President and CEO, is a privately-held third-party administration and consultation firm. The company was founded to deliver added value to employee benefit Plans that are self-funded for medical, prescription, dental, vision, short-term and long-term disability benefits. Flexible Spending Accounts (FSA), Health Reimbursement Accounts (HRA), and Health Savings Accounts (HSA) administration are also part of the portfolio of service offerings. Clients who choose J.P. Farley are located throughout the United States and share the strategy of managing their health benefit plans proactively by benefiting from state-of-the-art data management coupled with personalized customer service.

### J.P. Farley Contacts VBA

J.P. Farley first contacted VBA late in 2009. J.P. Farley communicated their frustration with their existing software and their need for a robust and flexible solution that could accommodate a large, new client that was being pursued. Using the VBA software system, a solution was laid out that would enable J.P. Farley to land this new client and bring them live within 90 days while also converting their existing business over the next 180 days.

### Business Challenge

When J.P. Farley first contacted VBA it was clear they were experiencing problems with their existing software system. It was obvious that staying with the existing system was going to stagnate their growth and, eventually, lead to losing clients. As communicated by Michelle Bounce, the Director of Operations, *“Our previous system was difficult to manage, archaic and lacked the configurability necessary to handle some of the more complex plan structures in the industry today. In particular, we needed a system that could handle our newest client, HPMS. We found that the flexibility and functionality available in VBA met that need and allowed us to continue to grow our business.”* J.P. Farley was at a functional and technological crossroads. They could stay with their existing system and risk losing business or they could modernize their software and maintain a leadership role in their space. The choice was simple and a new partnership was born that would help shape the future of both companies.

### Case Study Highlights

**Business Challenge:** Outdated claims system with limited functionality was not capable of handling the requirements of a large new client.

**Technical Challenge:** Limited configuration and costly customizations led to an inflated internal IT support staff.

**Solution:** VBA cloud-based administration software paired with VBA Business and IT Services.

**Benefits:** Utilizing the flexibility, functionality and technology available with VBA, the client was able to benefit in a number of ways:

- Implemented a large new client on the VBA platform within 90 days.
- Modern, user-friendly, cloud-based solution that provided vastly superior customer service and staff effectiveness.
- Easy to use solution that allowed for accelerated training and expertise for new employees.
- Ability to comply with state CMS filing and encounter reporting.
- Leverage VBA backroom services to facilitate new technical requirements.

**Timeline:** VBA was tasked with bringing a new client live within 90 days.

## Technical Challenge

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J.P. Farley, having been on their existing system for over 15 years, became experts at squeezing every ounce of information and functionality out of their software. Over the years, as limitations would arise, there would be IT resources secured and allocated to work-around these confines. A dangerous path was being followed where the growth of the company was predicated on the amount of expensive IT resources available to bridge gaps in functionality. Jim Farley, President and CEO, *“The TPA landscape is changing every day. Our company could no longer afford to be limited in scope by the software we were using and the amount of IT resources we could throw at a problem. With VBA we were given a software package that not only met our functional and technical requirements, but VBA IT Services also allowed us to reconfigure our own internal IT resources into experts on business data. The combination has made us highly scalable and more capable of handling market demands.”* J.P. Farley was cornered by the limited technical capacity of their existing software. The demands of their newest client (5010 Encounter Reporting and real-time data access) meant that a new technology solution had to be found.

## Solution

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W180 N11711 River Lane  
Germantown, Wisconsin 53022

**Phone** 866.731.1571

**Fax** 262.946.1201

**Email** [sales@vbasoftware.net](mailto:sales@vbasoftware.net)

**Website** [www.vbasoftware.net](http://www.vbasoftware.net)

Based on the business and technical challenges presented by J.P. Farley, it was determined that the VBA SaaS (Software as a Service) model was the appropriate solution. VBA SaaS is a hybrid solution combining industry leading software and expert services. VBA is health benefits administration software designed to provide one, common architecture for Health Plan and Employee Benefit processes delivered on a secure, cloud-based architecture. The VBA software application would allow J.P. Farley to process all lines of business, including: *medical, dental, vision, disability, life, FSA, HRA, and HSA.* This all-in-one, easy-to-use software application also provides comprehensive customer service, plan management and reporting capabilities. VBA Services would afford J.P. Farley the opportunity to reconfigure resources and expand business expertise. VBA Business Services would work closely with functional experts at J.P. Farley to improve and redefine processes while VBA IT Services would focus on automating interfaces and managing trading partner/vendor relationships.

## Benefits

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### Flexibility

VBA offered J.P. Farley a unique brand of flexibility. All system functions are highly configurable and do not require VBA to create customizations to handle changing market demands. As Jim Farley noted, *“I want to think about the sale, not the limitations of the software. It gives me peace of mind knowing that VBA is flexible enough to accommodate whatever I dream up.”* VBA is able to blend this flexibility and an industry leading user experience to improve the productivity and effectiveness of both new and existing employees. Michelle Bounce expanded on this, *“VBA has a very easy-to-use and flexible interface with numerous shortcuts and navigation options that have allowed us to streamline our training process. What we have learned is that VBA helps the user become an expert at what they do. This creates a more knowledgeable and productive employee who can be a better steward for our client.”*

### Functionality

VBA provided J.P. Farley with an enterprise level solution with all the required functionality without any additional add-ons or plugins. J.P. Farley is able to leverage this functionality to simplify workflow and offer benefits to their clients that were unavailable in the past. Key functionality like plain language plan design, easy navigation and highly configurable security has empowered J.P. Farley and made them more effective. Jim Farley, *“System functionality is paramount to the construction of workflow. If the system lacks in functionality, you end up with cumbersome workarounds and needless waste. All VBA functionality being in one system has allowed us to improve as a company to the benefit of our clients.”*

## Technology

VBA provided cutting-edge technology that gave J.P. Farley a unique selling proposition over their competition by providing efficiencies and capabilities in staffing and resource deployment. As a cloud-based, smart-client application that utilizes the latest in Microsoft technologies, VBA has enabled J.P. Farley to meet modern employee demands for telecommuting without losing productivity. A highly effective workforce that can access information anytime from anywhere reduces cost and mitigates risk. This technology was critical for J.P. Farley to succeed with their new client, HPMS. Michelle Bounce, *"It was imperative that we provide real-time access, remotely, for HPMS. VBA software gave us the technology we needed to meet that requirement. VBA IT Services also allowed us to seamlessly transition to 5010 encounter reporting which would have been an insurmountable hurdle under our old software package."*

## Conclusion and Timeline

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VBA flexibility, functionality and technology combined with J.P. Farley expertise and industry experience has created a potent partnership. Together, the sky is the limit.

