



**Benefitfocus**

## Employee Benefits Administration & Management Solution [SOLUTION] Project Initiative



### **Invenio-LSI/BenefitFocus - Current Status of** **PEBP SOLUTION Project Initiative** **EXECUTIVE SUMMARY – As of March 17<sup>th</sup>, 2022**

#### **Project Status - Program Management - Viewpoint and Perspective:**

The SOLUTION has been LIVE in production for approx. 2 ½ months and continues to go through the normal, expected Stabilization and Maturity process, when transitioning from a 15+ year, old, very customized (specific to the State of NV) Employee Benefits Management Solution.

Invenio-LSI/BenefitFocus has had considerable challenges with fully delivering the remaining key component of the overall SOLUTION (Direct and Group Billing) due to the overall complexity and specific State Requirements for this functionality. We have however, developed (since the last PEBP Board Mtg) a detailed plan to deliver this functionality, as contractually committed, by April 18<sup>th</sup>, 2022 - and have been meeting committed milestones of this plan to PEBP since sharing the plan with PEBP on February 11<sup>th</sup>, 2022. In the interim – Invenio-LSI/BenefitFocus has committed to PEBP to develop customized reporting to address the need for Billing visibility. Due to the complexity of this required reporting and that it also involves SMART21, State Legacy Payroll, NSHE, PERS ... we are working as diligently as possible to deliver PEBP what it needs to accommodate payment and cost visibility - ASAP

Invenio-LSI/BenefitFocus absolutely acknowledges and shares the frustrations which PEBP Members are having as this new SOLUTION is fully deployed. We are continually finding data quality and data validation issues and challenges from the PEBP's old provider/solution which contribute to these challenges. In addition, because of the non-universal processes and requirements across PEBP's main entries (STATE, NSHE and PERS), this has caused the need for immediate analysis and workarounds pertaining to Eligibility rules, workflow and processing, which Invenio-LSI/BenefitFocus is doing our best to accommodate. With a complex Enterprise Technology and Service Transformation of this nature – it is not reasonable or feasible that until Full Stabilization and Maturity occurs – there will not be some level of data/integration issues to deal with. The challenge we have collectively (my organization, PEBP, PERS, NSHE, SMART21, State Payroll) faced is remediating all identified issues in real time, while other implementation and operational requirements/processes continue.

Invenio-LSI/BenefitFocus also acknowledges how challenging this has been for PEBP. Based on having to support a fully enterprise Transformation Initiative of the nature (the move to the new SOLUTION), coupled with the integrating to and utilizing the new State SMART21 Platform, as well as needing to operate and address required day-to-day Employee Benefits Administration & Management has strained the PEBP resources. Given all of this however – PEBP continues to work very diligently to overcome these challenges, especially when utilizing a SOLUTION which is going through final Stabilization and Maturity. The PEBP Leadership has been fully supported of my Invenio-LSI/BenefitFocus team and I, as we have worked hard to collectively overcome each challenge, which has been identified.

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With Technology Transformation Project Initiatives of this scale and complexity (especially transitioning from a 15 year+ customized system to a modern, best-practice-based Software-as-a-Service (SaaS) based Solution) there is going to be a period of required Stabilization and Maturity. We absolutely believe however that this period will come to an end before the next Open Enrollment (scheduled for May 1<sup>st</sup>, 2022) and have committed this to PEBP as such.

We believe that in the 2 ½ months since the SOLUTION's Go-Live, Invenio-LSI/BenefitFocus continues to proactively support and address any/all issues, challenges, constraints which PEBP brings to our attention in the most expeditious manner possible. Each challenge/constraint and issue - requires analysis, remediation, testing and validation, to fully address.

This Transformation project has been challenged with a number of unseen factors, COVID-19, Key Personnel Transition, sub-optimal oversight in the beginning part of the Project, primarily (due to COVID-19) remote execution and interactions, fully understanding the PEBP's requirements and needs, data quality and support from the previous provider, the transition to the State's new SMART21 Solution... Nevertheless – Invenio-LSI/BenefitFocus absolutely remains fully committed to addressing and working through each of these challenges towards delivering a complete, comprehensive, reliable SOLUTION to PEBP.

To that end, Invenio-LSI specifically put in place (since late last year, prior to Go-Live) significantly expanded oversight and program management resources and capabilities to assist PEBP. This level of committed oversight and program management will continue – to ensure complete transparency, responsiveness and remediation are provided to deliver a complete SOLUTION to PEBP and its Members.

As part of this commitment and acknowledgement of the challenges experienced to date – Invenio-LSI/BenefitFocus has provided Service Credits well above and beyond the what the contract outlines. In the spirit of continued partnership – Invenio-LSI/BenefitFocus will continue to leverage our 14+ month experience and knowledge in working with PEBP towards fully understanding what PEBP needs within our SOLUTION to deliver what was outlined in the Contract, per the Project Charter, Goal & Objectives and per feasibility/best-practices.

We have also discussed with PEBP Leadership, from a proactive perspective – Options which we would fully support, at no additional cost to PEBP, (should they wish to exercise these Options) – to address their concerns with our Technology/Service Provider (BenefitFocus) Service Quality & Responsiveness, should PEBP desire to move to our recommended, alternative different Technology/Service provider, going forward.

PEBP has invested over 14+ months into this Transformation and we firmly believe that this investment will be rewarded within the next (2-3) months as Invenio-LSI/BenefitFocus delivers:

- The required and expected Direct and Consolidate Billing Solution
- A Successful FY23 Open Enrollment (Starting May 1<sup>st</sup>, 2023)
- Fully addressing and remediating the Data Quality/Data Validation challenges and issues
- Fully addressing and remediating the Data Integration challenges and issues
- Providing PEBP the Reporting and Analytics needs for Payment and Cost visibility/reconciliation

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Abandoning this Investment and confirmed near term remediation efforts in our respectful opinion will not materially solve the original Goals/Objectives of this PEBP Transformation Initiative. The State had a Solution provider and Solution which was in place for 15+ years, customized to specifically what the State of NV required. This Transformation Initiative requires business process changes to fully adapt to a modern, SaaS Solution. Getting through the next 2 Months within the Stabilization/Maturity/Readiness for Open Enrollment period – will significantly chart out a viable path forward for PEBP with the new Invenio-LSI/BenefitFocus Solution /Service.

In summary, Invenio-LSI/BenefitFocus objectively believes that PEBP and PEBP Member satisfaction will dramatically improve over the next 2-3 months as we exit the Stabilization and Maturity period, especially as the STATE/PEBP Board implements the new changes for Plan Year FY23. From an overall disruption and Member satisfaction perspective – getting to this point will be beneficial – for PEBP to fully meet its overall Goals and Objectives for this PEBP Employee Benefits Administration & Management Solution Transformation.

*Best Regards,*

*Scott*



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## HIGH LEVEL Project Status *Overall:*

- SOLUTION has been in LIVE Production Status for (2) of the (3) major components
  - ✓ Voluntary Benefits (December 1<sup>st</sup>, 2021)
  - ✓ Main SOLUTION (January 3<sup>rd</sup>, 2022)
- SOLUTION – Member Participation & Utilization:
  - ✓ 43,000(+) Members
- The SOLUTION remains in an overall “Stabilization and Maturity” mode to fully address all of the identified key/critical issues. Invenio-LSI/BenefitFocus is targeting to exit this mode by the end of April-2022 overall and the end of March-2022 for many of the identified Key/Critical Issues, which are outlined in this Executive Summary Report.
- Overall, from an Invenio-LSI/BenefitFocus perspective – the overall Status is “orange” from the previous status of yellow (last Board Report). This is due to a mixture of elements:
  - Overall Reliability and Operation of the CORE Solution – GREEN
  - Overall Reliability and Operation of the Voluntary Benefits Solution – GREEN
  - Ability to Process Day-to-Day Benefits Administration (Member Access & Utilization) – GREEN
  - Data Quality/Validation – YELLOW
  - Data Integrations – YELLOW
  - Direct/Consolidated Billing – RED
  - Visibility for Billing and Cost Information - RED
  - Upcoming PEBP Open Enrollment Support and Readiness - YELLOW
- Invenio-LSI/BenefitFocus continues to work diligently – based on the defined contractual support and remediation processes to assist PEBP with remediating and addressing issues/challenges/constraints as they arise.



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- Continued Challenges Remain - in transitioning from PEBP's (15+) Year Solution, which was customized for the State of NV-PEBP organization over this time period, to specifically fit/address the State of NV Employee Benefits Administration needs and requirements. Specifically:
  - ✓ Data Quality & Data Validation
  - ✓ State's existing Payroll Systems (for PERS – Pension Deduct) different and somewhat inflexible to fully accommodate integration to the new SOLUTION – causing required workarounds
  - ✓ Non-Universal Processes and Requirements across the main PEBP entities (State, NSHE and PERS) – requiring workarounds
  - ✓ Concurrent Transitioning over to the State's new SMART21 Solution requires detailed process changes and alignment between PEBP and State Payroll
  - ✓ PEBP's requirements for Financial Accounting and Management is not inherent in modern Software-as-a-Service (SaaS) based Employee Benefits Administration & Management Solutions offered today (such as the SOLUTION which Invenio-LSI/BenefitFocus is providing).
    - Best Practice is to locate this in a true financial accounting and management system
    - Invenio-LSI has recommended this process be moved over to a fully integrated "mini-SMART21 Financial Management application" which will be consistent with what the State will be utilizing for all of its Financial Operations and Management going forward.

## ***RISKS***

- Some Members effected by Data Quality and Validation – indicating no coverage will continue until all Data Validation & Quality areas are fully remediated
  - Amount and Frequency seems to be decreasing – Plan to fully and practically remediate in place
- No current Billing Visibility for PEBP to issue Group Invoices (Consolidated Billing)
  - Invenio-LSI/BenefitFocus actively working on interim reporting and analytics to provide to PEBP
- Potential for State's Health Services Vendor Service disruptions, based on Billing Platform not yet in Production
  - Invenio-LSI/BenefitFocus proactively working with PEBP to immediately mitigate any Member issues

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- Ensuring PEBP's New Open Enrollment for new Plan Year is a complete success – given all of the anticipated changes and requirements from the PEBP Board Mtg (3/24/2022)
  - Invenio-LSI/BenefitFocus proactively working with PEBP put a plan in place to ensure a successful, upcoming OE
  - Presentation and Review of this Plan – scheduled for 3/21/2022

### ***Expected – "Post Go-Live Challenges:***

- Data Quality and Consistency within Legacy Solution
- Data Integration Maturity and Optimization
- Maturing and Optimizing Eligibility Logic
- Overall Change Management Optimization
- Single-Sign On/ First Time User Access

### ***Unexpected Post Go-Live Challenges:***

- Lack of integration flexibility of State's existing Payroll Platform
- Number of different processes and requirements across PEBP Agencies (STATE, NSHE, PERS...)
- Required SMART21 HR Demographic Changes not previously planned for.
- New Eligibility and Process/Rules Requirements from previous legacy solution provider/solution
- Complete Financial Processing and Management expectations and requirements from PEBP, which was facilitated in their previous Solution

### ***Invenio-LSI/BenefitFocus – Identified Challenges*** [Looking Back – What could we have done differently]

- Conducting the session, we had with PEBP Operations and Leadership [Detailed Whiteboard Process Review Session around Direct and Consolidated Billing] much earlier
- Allocating more resources to handle the amount of Member Data Issues during Stabilization and Maturity Period
- Putting in place more quickly – an enhanced oversight and governance capability
- Putting in place more quickly an interim reporting and analytics capability for PEBP while Direct & Consolidated Billing which has been delayed
- Improving the level and quality of communications with PEBP

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*Invenio-LSI/BenefitFocus – Corrective Actions / Proactive Partnership based Support to PEBP* [Since last PEBP Board Mtg 1/24/2022]

- “All-Hands-On-Deck” Approach from Invenio-LSI/BenefitFocus to assist PEBP
- Finding and implementing as quickly as possible – Remediations and Workarounds to assist PEBP
- Making needed Key Personnel Changes where appropriate to improve the level of responsiveness and support to PEBP

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## HIGH LEVEL

### Key/Critical Identified Challenges – Current High-Level Status

Data Quality  
in SOLUTION

#### *Invenio-LSI/BenefitFocus Perspective:*

- ! Issues Identified and Conveyed by PEBP
- ! Invenio-LSI/BenefitFocus remediating each and every Issue/Challenge
- ! Most of the Challenges are a function of transitioning from previous provider

#### *Remediation Plan*

- ! Continued diligent work effort to remediate all identified challenges
- ! Committed Plan to PEBP – All identified challenges will be remediated by 3/31/2022

Data  
Integration  
and Interfaces

#### *Invenio-LSI/BenefitFocus Perspective:*

- ! Issues Identified and Conveyed by PEBP
- ! Invenio-LSI/BenefitFocus remediating each and every Issue/Challenge
- ! Challenges are in (4) buckets
  - State Legacy Payroll
  - State – SMART21
  - HSB
  - PERS - Remittance

#### *Remediation Plan*

- ! Continued diligent work effort to remediate all identified challenges
- ! Committed Plan to PEBP – All identified challenges will be remediated by 3/31/2022

Upcoming –  
New Plan Year  
PEBP Open  
Enrollment

#### *Invenio-LSI/BenefitFocus Perspective:*

- ! Concerns and Requirements – Provided by PEBP 2/15/2022
- ! Invenio-LSI/BenefitFocus putting Plan in place to address each and every concern/requirement

#### *Remediation Plan*

- ! Updated/Enhanced OE Plan for Readiness and Requirements – Mtg scheduled for 3/21/2022
- ! Invenio-LSI/BenefitFocus does not see any issues meeting PEBP's Requirements for upcoming OE- scheduled for 5/1/2022

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Required  
Refunds/  
Charges

***Invenio-LSI/BenefitFocus Perspective:***

- ✓ Issues Identified and Conveyed by PEBP
- ✓ Invenio-LSI/BenefitFocus working with STATE Payroll and PERS to find a viable Solution / Remediation

***Remediation Plan***

- ✓ State Payroll Challenges will be Remediated in SMART21

***Outstanding Issue***

- ! Still working through the "Penny" charge challenge based on rounding rules, requiring either refunds/and or credits to PEBP Members

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Direct &  
Consolidated  
Billing

### *Invenio-LSI/BenefitFocus Perspective:*

- ✓ Full & Complete Remediation Plan to deliver Direct and Consolidated Billing Functionality – presented to PEBP on 2/11/2022
- ✓ Invenio-LSI/BenefitFocus remains on-schedule – per the plan

### **Remediation Plan**

- ✓ Execute each and every detailed Step in the Remediation plan – on-time and in a quality manner
- ✓ Continue to provide transparent updates to PEBP on Plan Status
- ✓ Be as flexible to PEBP as possible as they test/validate Direct & Group Billing Functionality

### **Outstanding Issue**

- ! Detailed Financial Management & Process Functionality

## Direct & Group Billing Functionality Go Live Milestones – Status as of 3/16/22

Milestone	Start Date	Completion Date	Status
Review & Confirmation of Subsidy Requirements	2/3/2022	2/10/2022	Completed 2/10/2022
PEBP Final Approval of Subsidy Requirements (Verbally approved in 2/3/22 Billing Meeting, no changes)	2/11/2022	2/14/2022	Completed 2/13/2022
Establish & Agree on Go Live Criteria	2/14/2022	2/18/2022	Criteria reviewed and verbally approved on 3/9/2022 Billing Kickoff mtg
Load Subsidy/Billing Data & Generate Test Invoices	2/11/2022	2/22/2022	Completed 2/22/2022
Benefitfocus Invoice Review & Validation	2/23/2022	3/15/2022	Completed 3/15/2022
PEBP Initial Review & Validation of ALL Invoices & Aging Balances (10 day lag after BNFT validation begins)	3/9/2022	3/22/2022	Started 3/9/2022 and in progress. Yellow due to short timeline for PEBP to complete validation and all issues to be resolved. Benefitfocus to confirm ability to accommodate all requests/feedback/issues and timeline.
PEBP approval on all invoices (PEBP, Employer & Member)	3/23/2022	3/23/2022	Contingent upon confirming timeline for accommodating issues/feedback equated to a "Major" or above severity level
Billing Production Readiness, Go Live Communication & Production Deployment	3/24/2021	3/31/2022	
Benefitfocus Production Invoice Review	4/1/2022	4/7/2022	
PEBP Production Invoice Review	4/8/2022	4/15/2022	
Go Live (invoices mailed to employers/presented to members)	4/18/2022	4/18/2022	

**NOTES:**

1. Daily stand-up meetings will be scheduled to ensure we stay on track with the timeline and work through any issues timely
2. BNFT and PEBP invoice validation may require more or less time than estimated, which would impact overall go live date

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