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OCA & SandMartin



Less Worry, Good Results

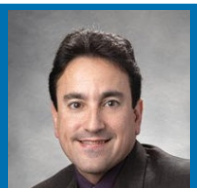
OCA (Office of Compliance Administration) was founded by Stephen Honig in 1983 and began providing Cafeteria Plan administration services to its clients in 1986 and expanded its services to include Health Reimbursement Arrangements in 2004. Their operations included administering Section 125 flexible benefit plans and ERISA. Today, OCA provides employee benefit solutions to more than 4,500 employers accounts throughout Northeastern US states, across many industries.

As a growing family owned business, OCA always recognized the value of partnering with the very best. To build their distribution system, OCA made a conscious effort to reach out to some of the very best brokers and general agents. OCA has accompanied this with the industry leading technology and a core philosophy that they will hire, train, and develop employees that know they have one fundamental job to do; that's to help people. **OCA view their role as not just an administration company, but rather an "Employee Benefits Delivery Organization"** established to provide employers, General Agents, Brokers, and plan participants with the most cost effective and efficient benefit packages available. Most importantly **they are in business to help people.**

With the continuous growth in business OCA was **increasingly burdened with seasonal pressure to process claims and deliver effective solutions to its clients.** Thus, to close the gap between rapid growth & seasonal pressure, in the 2nd half of 2017 OCA explored an economic and efficient solution: **'The SandMartin Outsourcing Model'** for their claims adjudication needs.

OCA was aware that **SandMartin is a cross-platform expert** and even though they were planning to move to Alegeus from DATAPATH nevertheless, OCA decided to engage the services of SandMartin to help them prepare for the migration. SandMartin within a short period of time was working on the claims adjudication activities of OCA on the software Datapath as per the requirements of OCA. SandMartin with their "can do" attitude had proven to OCA that they are true experts on Cafeteria Plan Administration and their services are not just limited to one platform/application. **This option guaranteed improved processing efficiencies with guaranteed cost savings and more importantly allowed OCA to reduce turnaround time with efficient claims processing.**

“A key corporate objective was Immediate scalability to handle unanticipated growth, lower our overall operational costs and to have the ability to provide consistent and reliable claim processing turnaround times that is the envy of the industry. The formation of a close partnership between OCA & SandMartin in a short time is a testament to the sharing of the same set of core values between our firms.**”**



Stephen S. Honig, Principal OCA Benefit Services

In a short period of time, with soaring confidence in the **Sand-Sourcing Model (SandMartin Outsourcing)**, OCA expanded their relationship to various other verticals beyond Debit Card Claims Adjudication. This included Paper form Claim (Manual Claim), and claim importing process. **SandMartin also assists OCA with a variety of administrative work to include; Paper form Enrollments, Enrollments, Implantation files and COBRA Initial notice.** SandMartin successfully processed 20,000+ claims during the first peak period of partnership i.e. Quarter 1 of 2018 reducing peak season pressures on OCA and enabling them to concentrate on their core competencies.

In order to foster team and relationship building within the outsourcing boundaries, **it is important to embrace a spirit of closeness and mutual respect.** This respect has promoted a better rapport at all levels of staff. The trust and bond is reflected in the Two-fold increase in volume of work in a short span of time. Today we process over 7,000+ claims per month for OCA besides Other processes and the partnership is poised to grow exponentially in the next quarter with another 20,000 Claims+ per month to be outsourced to SandMartin. OCA is now in the midst of taking a strategic decision by considering alternative platforms. **With the advantage of having a partner in SandMartin having prior experience on several platforms including Datapath & Alegeus platforms, OCA is in a sweet spot of having the best without having to worry about significant migration challenges & training their staff/migratory overlap costs.**

Along with the many advantages that SandMartin provides, the **TPA always retains the right to hold back on what groups services are provided for by them.** Like many other TPAs, OCA also has some contractual requirements with certain groups to ensure that all their data is kept "in-house" and not off-shored. Accordingly, there is a proper mechanism in place to ensure that the terms of such contracts are respected & SandMartin is not given access to the data of such groups by having proper internal controls in place.

The core strength of SandMartin is their dedication to quality delivery and client satisfaction. Their "can do" attitude combined with the personal involvement of the senior management to ensure that the Client expectations are consistently met, justified our faith and confidence in them as the Ideal Outsourcing Partners.

Ross Honig, Sr. Vice President
OCA Benefit Services



As a result of the trust developed in the relationship and the multiple levels of physical and data security provided by SandMartin, OCA grants direct access to their server to SandMartin. Being a visionary, Sunil Goel from SandMartin was always committed to the highest levels of compliance with the international security standards and is proud of the fact that SandMartin is one of the very few global companies to have both **ISO 27001:2013 (ISMS certification equivalent to SSAE 18 norms in the US) & ISO 9001:2015 Certification.** At SandMartin, no processors can access personal data from their workstations and with various security controls including state of the art firewalls & end-point protection tools, the highest importance is given to data protection and confidentiality.

From the very inception of the outsourcing wing I have believed that business opportunity lies with customer's needs. Keeping this in mind SandMartin has always strived to provide valuable assistance to our clients specially in cases where client wants to attain an extra-edge over their competitors providing better & efficient practices followed by other players based on SandMartin's knowledge base. This helps us to add value to our clients & keep them at pace with the dynamic global environment.

Sunil Goel, Founder President
SandMartin - Outsourcing Experts



SandMartin is well placed at multiple metro locations in India enabling them to attract talent pool committed to meeting deadlines - Quick Turn-Around Time has been a promise met. The quality of their work even under the peak-season pressures has been greatly appreciated by the OCA team. The Sand-Sourcing solution has been the right choice in finding expertise and dealing with peak season pressures is no longer a challenge for OCA.

Today OCA is able to focus on their core competence and needs of their valued clients throughout the United States as a result of their partnership with SandMartin. **Adopting outsourcing has enabled OCA to reduce costs as well as deal better with peak season pressures.**



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