

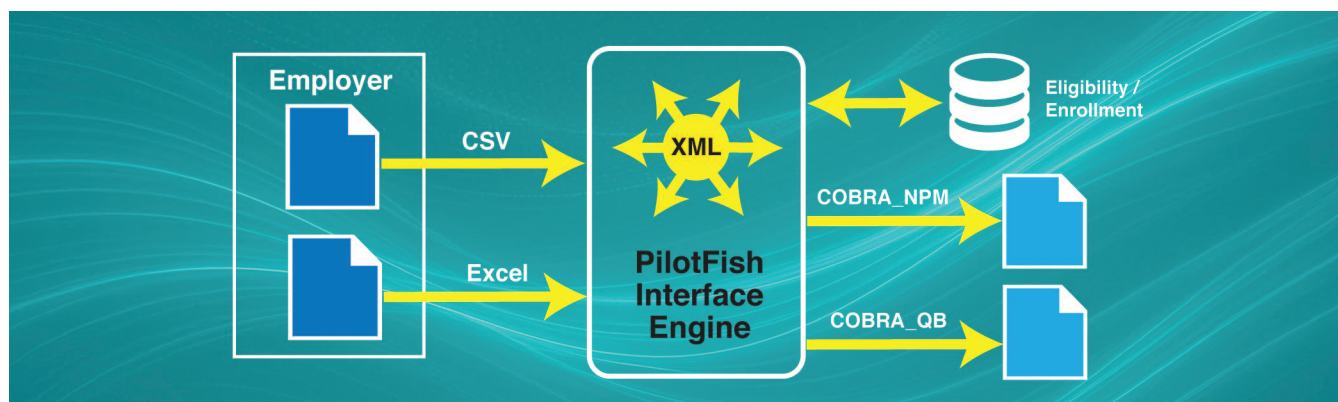
PilotFish Studies in Integration

Leading Risk Management Firm Modernizes EDI with PilotFish

Top-Tier Insurance Provider Partners with PilotFish to Streamline Data Integration, Reduce Technical Debt and Build In-House Expertise

When a nationally recognized insurance and risk management firm found itself bogged down by legacy systems and an increasingly complex data exchange environment, it was clear that business as usual wouldn't cut it anymore. The firm needed a more innovative way to manage the flow of critical information between carriers, clients, and internal systems without sacrificing security or agility. That's when they turned to PilotFish.

With a phased implementation plan in hand and a focus on internal enablement, the partnership is helping the organization reduce technical debt, eliminate bottlenecks and equip its internal teams to build, maintain and expand integrations with confidence. And despite a jam-packed calendar filled with open enrollment and year-end demands, both sides have kept the project moving forward, thanks to clear communication, flexible planning and shared commitment.



THE CLIENT

The client is a global leader in insurance brokerage and risk management, with a presence spanning the U.S. and international markets. Its service portfolio includes everything from employee benefits and claims management to underwriting, advisory and third-party administration (TPA). Within the organization, the TPA division is central in supporting employer groups with benefits enrollment, billing, eligibility and reporting.

This team is no stranger to complexity. Their work relies heavily on managing structured and semi-structured data, including HIPAA-compliant EDI formats like the EDI 834, and orchestrating the timely movement of that data between multiple systems. On any given week, they handle everything from daily file exchanges with insurance carriers to custom client billing outputs, all under tight Service Level Agreements (SLAs) and stringent compliance rules.



PilotFish Studies in Integration (continued)

Recognizing the need for scalable, repeatable integration workflows, the company's IT leadership has spent the past few years pushing modernization initiatives that reduce reliance on outdated tools and empower internal teams to own their integration stack. With client demands on the rise, several recent acquisitions to integrate and a slow-moving migration away from a legacy OpenVMS-based platform, it became clear that a new approach was needed—and fast. After a comprehensive evaluation, the client selected PilotFish to help them modernize integration operations without disrupting mission-critical workflows. Their goal? Streamline the flow of information, reduce manual dependencies, and give their teams the tools to scale securely and sustainably.

THE CHALLENGE

No surprise here: the client's integration environment had become increasingly unwieldy. The TPA group juggled multiple incoming and outgoing data streams from different carriers, in varying formats, while trying to keep everything flowing into internal billing and reporting systems. Many of these workflows still relied on manual processes or semi-automated tools that weren't cutting it.

The biggest pain point? Their legacy OpenVMS system, which had served them well but was now holding them back. Although a migration plan was in motion, it wouldn't be completed overnight. The client needed a way to modernize data exchange now, without waiting for a full platform sunset.

Security policies presented another layer of complexity. External vendors, including PilotFish, wouldn't be granted access to the client's internal systems or databases. That meant the implementation had to follow a hands-off, consultative model, with infrastructure managed entirely in-house. Development and training would happen remotely, using screen sharing and local installations—a challenge for some, but a familiar scenario for PilotFish.

And then there was timing. Integration planning kicked off just as internal teams were entering their busiest time of year: open enrollment, end-of-year client renewals and multiple internal transitions. As a result, server provisioning and training coordination were delayed, not for lack of motivation, but simply due to competing priorities.

Still, the client stayed the course. They reorganized internally to remove blockers. Next, they delegated training coordination and kept stakeholders aligned. PilotFish adjusted its engagement to fit the client's pace, offering support wherever and whenever needed.

THE SOLUTION

PilotFish came to the table with a two-pronged strategy: support the client's infrastructure constraints while simultaneously enabling internal teams to take the reins.

The first order of business was spinning up a secure development environment. The client provided a set of Windows-based virtual machines in its data center, fully complying with its internal IT and security policies. PilotFish provided the guidance—Java 17, Apache Tomcat, WAR files and licensing requirements and the client handled the install. Simple, streamlined and entirely under the client's control.



PilotFish Studies in Integration (continued)

In the meantime, users installed PilotFish's eiConsole development tool on their local machines. Because the eiConsole doesn't require a server, users could dive in immediately—mapping data, exploring test workflows and getting familiar with the software before the backend environment was even live.

The first real-world integration was a consolidated billing workflow. This involved parsing and transforming incoming 834 enrollment and census feeds from multiple carriers. Then they had to apply client-specific logic and output clean, accurate billing files. Previously, this process had relied on a patchwork of scripts and manual reconciliation. With PilotFish, it's being rebuilt as a reusable, automated workflow that will serve as the template for future integrations.

Training was split into two tracks: infrastructure and workflow design. The client's IT and middleware teams focused on server-side setup and maintenance, while analysts and EDI implementers received hands-on instruction using real data and active workflows. When scheduling proved difficult, the client assigned a dedicated point person to own coordination, clearing the way for training to move forward.

Early in the year, communication between the teams was humming. A Business Associate Agreement (BAA) was in place, allowing secure file sharing for debugging and refinement. With a strong foundation in place, the team was ready to build on it.

THE BENEFITS

From day one, this partnership was about more than just a technology deployment. The client wanted to build long-term integration capabilities in-house, and that's precisely what's taking shape. Thanks to PilotFish's dual-track implementation, internal teams could get hands-on with the tools early and often.

The local development environment meant training could begin immediately before the backend infrastructure was finalized. That agility helped maintain momentum even when internal priorities shifted. And while technical enablement was a key focus, so was operational autonomy. PilotFish didn't just train the team on features—they helped them understand the "why" behind each workflow. That guidance now pays dividends as internal staff take the lead on building and managing integrations.

Another major win: adaptability. When the client hit bottlenecks, due to resource constraints, end-of-year volume, or scheduling snags, PilotFish adjusted seamlessly. The teams met regularly, shared status updates and stayed aligned without overcomplicating the process.

Today, the client has a modern, extensible integration framework that meets both their technical and compliance needs. The initial billing workflow is already being used as a model for others. Additional integrations are already on the roadmap.

This engagement isn't just solving today's problems, it's laying the groundwork for tomorrow's growth. The client now has modern tools, internal expertise and a strong integration strategy, which has positioned it to deliver better, faster and more consistent results across the enterprise.



PilotFish Studies in Integration (continued)

Since 2001, PilotFish's sophisticated architecture and innovations have radically simplified how healthcare integration gets done. Today PilotFish offers the most flexibility and broadest support for healthcare integration of any product on the market and is system, platform and database agnostic. PilotFish's healthcare integration suite includes support for all healthcare data formats (HL7 2.x, HL7 3.x, FHIR, CCD/CCDA, JSON, XML, X12 EDI, NCPDP, etc.) and communication protocols.

PilotFish is architected to be infinitely extensible with our Open API and flexible to meet any integration requirement. PilotFish distributes Product Licenses and delivers services directly to end users, solution providers and Value-Added Resellers. To learn more, visit our Case Studies or specific solutions like HL7 Integration or X12 EDI Integration.

PilotFish Healthcare Integration will reduce your upfront investment, deliver more value and generate a higher ROI. Give us a call at 813 864 8662.

