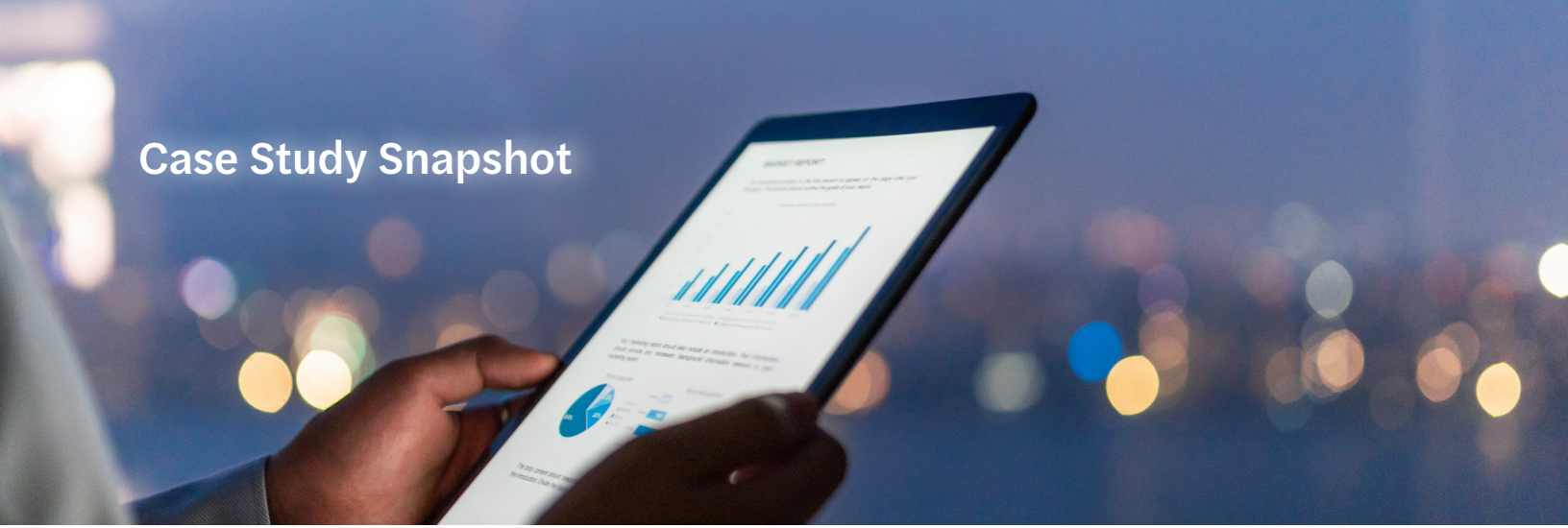


**Mid-America Carpenters
Regional Council**
Reducing Processing Times

**forv/s
mazars**

Case Study Snapshot



MACRC’s adoption of advanced Microsoft technologies led to a significant transformation, enabling the organization to better serve its members and improve internal operations.

The Situation

The Mid-America Carpenters Regional Council (MACRC) Benefit Administration office faced significant challenges with aging technology. Its legacy systems were not integrated, leading to inefficiencies and manual processes that hindered efficiency.

The Solution

To address these challenges, MACRC worked with Forvis Mazars to implement Microsoft Dynamics 365 Customer Service and integrate Microsoft Syntex, Power Automate, and SharePoint. This modern, secure cloud solution enabled MACRC to streamline processes, improve data management, and follow HIPAA compliance. The project involved complex integrations, significant security customizations, and the transition from a paper-based system to a digital one.

The Benefits

Since implementing Dynamics 365 and associated technologies, MACRC has experienced significantly reduced processing times, enhanced security of sensitive information, improved data management with the automatic indexing and routing of documents, and a notable reduction in complaint calls with a more efficient claims process.



“Before implementing this Dynamics 365 solution, (disability claims) was a department people didn’t want to work in. Now, that’s changed. Processes are automated and run much smoother and faster.”

– **Brian Lesters, Information Technology Manager**
MACRC

The Full Story

MACRC represents more than 28,000 active members in the Midwest, providing the construction and maintenance industries with certified professionals. The MACRC Benefit Administration office manages eligibility, health, disability, vision, dental, and retirement benefits for working and retired carpenters and their families in Chicago and the surrounding suburbs.

MACRC was using aging on-premises benefits management software that was not integrated with other systems and required manual indexing, which was time-consuming and inefficient. The office sought to eliminate the manual indexing by streamlining processes and migrating its system to the cloud.

The office decided to replace the software because updating it would have been costly and still required manual indexing. There also were high costs to maintain the outdated system. MACRC sought a cloud-based solution with integration and data storage capabilities and evaluated several technology platforms before selecting Microsoft Dynamics 365.

Implementation & Integration

The first project that Forvis Mazars took on was deploying the Dynamics 365 solution for the office's disability claims process, which used to be very difficult and time-consuming. With the new streamlined workflow, claims take just a few days to be processed and paid instead of weeks, which increased productivity and reduced participant complaints. The disability claims team adapted well to the new system, finding it easier to use and more efficient than the previous one.

"This initial CRM project proved to our stakeholders that there are better ways to do things," said Brian Lesters, MACRC information technology manager.

HIPAA compliance and internal security restrictions were important to MACRC during the system

implementation. For HIPAA regulations, the office needed a secure environment with advanced protection for sensitive data. Forvis Mazars helped implement security measures in the system so only authorized personnel could access select claims data.

Specific views and roles were created within Dynamics 365 so different groups in the organization had access to whatever data was appropriate for them. For example, phone operators had less access than those handling disability processing. Custom views were made for each role, allowing employees to see only the information relevant to their tasks.

MACRC improved data accessibility and organization by using Syntex for file indexing and Power Automate for data management. Syntex automatically indexed files by taking meta data from the electronic file, using artificial intelligence to distinguish what type of file it is, and identifying the relevant participant based on predefined criteria. Power Automate marshaled files and data within the system, working in tandem with Syntex to route files to the appropriate SharePoint directories. Subfolders were created for different categories such as pension and health and welfare.

The office also streamlined mail handling and document scanning with the creation of a centralized scanning department, which improved efficiency and reduced the workload for individual departments.

The Results

Forvis Mazars helped MACRC implement a new system that provided improved integration between files and data, better management reporting, and increased efficiency in handling cases. The successful deployment in the disability claims department set the stage for further rollouts to other departments, demonstrating the value of modern technology in transforming organizational processes.

Business Technology Services at Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, and managed service solutions. Our end-to-end services include technology assessments, design, implementation, upgrades, training, monitoring, and support to help clients achieve their digital transformation goals.

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About Forvis Mazars

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