Kermit was wrong…

…it's easy being GREEN!

GoGreen basys

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Why Taft-Hartley is ready to GoGreen

- Efficiency – stop searching for lost or mis-filed documents
- Big savings on bulk mailings, paper, ink, postage, staff time
- Better data security and ERISA compliance
- Improved customer service and member satisfaction
- Leaving the next generation a greener planet!

The case for GoGreen: save time

Forbes

SEP 3, 2014 @ 02:57 PM 13,632

Why You Should Be Running a Paperless Company

Chuck Cohn, CONTRIBUTOR

FULL BIO

Opinions expressed by Forbes Contributors are their own.

In recent years, organizations ranging from health insurance firms to technology outfits have turned to paperless correspondence—paperless billing, paperless contracts, paperless receipts, and so on. A company where the use of paper is entirely eliminated or almost absent can be more elusive, but there are many advantages if you can accomplish it, and these advantages extend far beyond simply the admirable desire to operate a greener business. Paperless companies are ultimately more efficient and more

"**Less time devoted to non-essential tasks.**

Think about this: 123 years of *National Geographic* magazine with high resolution photos, or over 1,400 issues, can be stored on just one flash drive. Paperless filing can easily reduce long-term storage costs for your company, as well as allow you to access information near instantaneously. **Rather than spending time hunting for a piece of paper in a filing cabinet, you can pull up a document in a digital database within moments.** This efficiency means you can focus your manpower on other projects that are critical to the growth of your business…."

Read the full Forbes article.

The case for GoGreen: save money

Inc.

CREATE YOUR COMPANY

Your Business Needs to Go Paperless: Here's Why and How

Going paperless is a popular decision, but how would it really benefit your business?

By Larry Alton *Independent business consultant* @LarryAlton3

"According to the EPA, **a paperless office saves** **roughly $80 per employee** (annually) in costs related to paper, ink, toner, storage space, and postage. If you have an organization with 400 employees, this could total more than $32,000 per year. That's a substantial chunk of change for any company [*or fund office!*]."

Read the full Inc. magazine article.

The case for GoGreen: data security

> This might seem an odd benefit to mention considering the frequency of recent cyber-attacks, but **electronic documents are more secure than printed ones**. For one thing, digital records can be rendered unreadable through encryption. They can also be secured against printing, copying and sharing. Access controls can specify viewing privileges to a fine level of granularity. Audit trails reveal who accessed what documents and when. In contrast, printed documents are only as secure as their proximity to a copy machine.

IRON MOUNTAIN

INFORMATION MANAGEMENT DIGITAL TRANSFORMATION SECURE STORAGE SECURE DESTRUCTION

GENERAL ARTICLES

5 BENEFITS OF GOING PAPERLESS IN THE WORKPLACE

Home / Resources / 5 Benefits Of Going Paperless In The Workplace

Friday, Nov. 4 is World Paper Free Day. The Association for Information and Image Management (AIIM), which sponsors the annual campaign, encourages people and businesses to go without paper for one full day. If you're still on the fence, consider these five benefits to going paperless in the workplace.

Read the full Iron Mountain article.

The case for GoGreen: member service

The Boston Globe

This content is sponsored by Iron Mountain

Buried in paper? Go digital and dig out

Transitioning your small business from paper to online record keeping is not only smart; it's a lot easier than you think.

Read the full Boston Globe article.

"When files are scanned and digitized they are assigned keywords, making it easy to search for documents using terms the business and employees use every day. These keywords can link to other documents with the same metadata, making it easy to locate related files. **Instead of sorting through boxes and file cabinets, employees can access a digital file in real time**…."

Your members are more GREEN than you think

- Average age of union construction trade workers today: 43
- Internet use by demographic group
  - age 30 – 49 97%
  - age 50 – 64 87%
  - age 65+ 66%

Read the Pew Research Center study.

Even retirees often are ready to GoGreen

Pew Research Center *Internet & Technology*

HOME | U.S. POLITICS | MEDIA & NEWS | SOCIAL TRENDS | RELIGION | INTERNET & TECH

PUBLICATIONS | TOPICS | PRESENTATIONS | INTERACTIVES | DATASETS

REPORT

MAY 17, 2017

Tech Adoption Climbs Among Older Adults

Roughly two-thirds of those ages 65 and older go online and a record share now own smartphones – although many seniors remain relatively divorced from digital life

BY MONICA ANDERSON AND ANDREW PERRIN

A record 46 million seniors live in the United States today, and older Americans – those age 65 and older – now account for 15% of the overall U.S. population. By 2050, 22% of Americans will be 65 and older, according to U.S. Census Bureau projections.[1]

At the same time America is graying, recent Pew Research Center surveys find that seniors are also moving towards more digitally connected lives. Around four-in-ten (42%) adults ages 65 and older now report owning smartphones, up from just 18% in 2013. Internet use and

Read the Pew Research Center report.

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Members expect digital access

> Today virtually everyone has a mobile device, which changes the dynamic between members and fund office staff by **shifting member expectations around communication channels, turnaround time on benefits applications and access to accurate, real-time information.**

Changing Roles in the Modern Fund Office

A shift toward consolidation and changing member expectations are among the trends modern fund offices must respond to. New technology can be part of the answer, but fund offices also may need to consider new organizational structures.

benefits MAGAZINE

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46 benefits magazine november 2017

Download the benefits magazine article from the International Foundation for Employee Benefit Plans.

ERISA's Safe Harbor is GREEN

- Open enrollment materials
- Summary Plan Descriptions (SPDs)
- Summaries of Material Modifications (SMMs)
- Summary Annual Reports (SARs)
- QMCSO notices
- HIPAA certificates of creditable coverage
- New Summary of Benefits and Coverage (SBC) under the Affordable Care Act
- **EXCEPTION**: *COBRA docs are still better printed & mailed.*

Safe Harbor's eDelivery requirements

1. Obtain email address and consent to opt-in
2. Notify when document is available
3. Provide similar content & style as print version
4. Ensure privacy
5. Provide print version upon request
6. Monitor to ensure receipt

Download the full guidelines for ERISA Safe Harbor compliance.

eSIGN: for docs that need a signature

- Uniform Electronic Transactions Act (UETA) (1999)
- United States Electronic Signatures in Global and National Commerce (ESIGN) Act (2000)
  - Approved by all 50 states
  - Grants legal recognition to electronic signatures
- Global acceptance as well
- Why eSign? Accelerates transactions!

Download the rules for accepting digital signatures.

basys GoGreen: built on existing modules

POWERING BASYS GoGreen

writerxg™

On-demand generation and delivery of personalized documents

- Edit and design letters, forms and statements
- Generate documents for batch mailings or ad hoc to individuals
- Immediately send or archive to your ECM database

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writer xg™ template library

- Includes best practice templates for many common fund office documents….

Letters	Statements	Checks	Year-End
COBRA offering	Pension Statement	Annuity Check	W2
Pre-determination letter	Certificate of Coverage	Disability Check	1099R
Pend letter	EOB & Claim Check	Pensioner Check	1099MISC
Delinquency letter		Vacation Check	1099INT
		Claims Check	1095B

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basys Welfare Fund
3700 Koppers Street Suite #400
Baltimore, MD 21227
http://www.basys.com/ (410) 850-4900

COBRA Election Form

Member Identifier: XXX-XX-1111
Date Printed: 16 Dec 2015
Election Deadline: 60 Days from Date Printed

JOHN SMITH
PO BOX 1234
LAS VEGAS, NV 89133

Coverage Information:

Coverage End Date:	12/31/2015
Qualifying Event:	Voluntary Termination
Available Extension:	18 months
Qualifying Event Date:	01/01/2016
Election Deadline:	60 Days from Date Printed

Coverage Offered:

COVERAGE	TYPE	RATE	BENEFICIARIES
CORE COVERAGE	RATE	555.00	0,1,2
FULL COVERAGE	RATE	1555.00	0,1,2

Qualified Beneficiaries Offered:

QB#	NAME	BIRTH DATE	GENDER	RELATIONSHIP	IS THERE OTHER INSURANCE AVAILABLE?	ELECTING COBRA Y/N?
0	JOHN SMITH	01/01/70	M	MEMBER		
1	JANE SMITH	01/01/70	F	SPOUSE		
2	JENN SMITH	01/01/12	F	DEPENDENT		

Signature:
Phone Number: ( )
Date:

If elected, COBRA continuation coverage will begin on 01/01/2016

Sincerely,
COBRA Administrator

- Templates automatically pre-populate with basys data.
- Simplifies letter/statement generation.
- Eliminates mail merge and/or dependency on IT.

basys

GoGreen, save Green… get started!

- Run the numbers!
  - Start with the greatest savings – what mailings cost the most?

Go to the savings calculator online, enter your own expense info and test savings scenarios.

basys Go Green Savings Calculator

Current annual expense	
Printing	
Paper	
Postage	
Personnel cost	
% of members opting in	
Potential Annual Savings	$0.00

GoGreen tip: make opt-in easy

- Self-service for on-demand access
- Keep opting in simple!
- Offer links from your website home page and promote the option on your call center's "hold" message – many callers will opt for self-service if you make it easy for them!

GoGreen tip: give 'em what they want

Popular options:

- archived and easily accessible document library
- ways to manage their benefits and enroll online
    - email them when docs are available
    - remind them of the environmental impact

GoGreen tip: promote, promote, promote!

- Use **all** your communication channels to drive adoption. People generally need to hear new information 7X before they act!

- Your website
- Newsletters
- Social media
- Targeted messages on printed documents
- Your phone system hold message
- Quick videos
- Prizes, giveaways or green charitable efforts

GoGreen tip: use your front line

Encourage everyone with customer contact to spread the word about the advantages when members choose to **GoGreen**, including:

- Member Services team
- Business agents or field reps
- Training and apprentice contacts
- District Council contacts

GoGreen tip: plan for success

- Best practices:
  - Start with outbound
  - Grow incrementally
  - Add inbound IF it works for you

- Talk to your basys Account Exec for help developing a customized plan for your office to **GoGreen**.

Additional references & helpful links

Bank of America Trends in Consumer Mobility

IRS: 92% of individual tax returns are E-filed

ERISA eDelivery guidelines

E-signatures legally valid and enforceable in nearly every industrialized country around the world

NFL Players Association adopts eSignatures

Best Practices to help billers drive consumer adoption of paperless e-bills

Closing the eDelivery Gap

Pew Research: Defining Generations March 2018

New Technology in the Fund Office

E-communications from the Fund Office

basys

See? It IS easy being GREEN!

Contact your Account Exec for more info and a demo:

Liz Blair
lblair@basys.com
410.412.8839

Heather Lassen
hlassen@basys.com
410.412.8804