

The Always-Open Fund Office



Full-featured self-service portals give participants 24/7 access to the fund office and get valuable benefits to members in need.

Challenges

- ◆ To ease financial strains on members early in the COVID-19 pandemic, trustees of Carpenters Southwest Administrative Corporation (CSAC) wanted to offer early access to vacation payouts.
- ◆ Using postal mail to notify participants, collect payout request forms and distribute the checks would add complexity and cost, delaying payments to members in need.

Solutions

- ◆ With their **MemberXG** portal from **basys**, participants could submit their request forms and sign up for direct deposit online, getting money into their bank accounts in days instead of weeks.
- ◆ CSAC could then collect participant email and text contact opt-ins so that future communications could be quick, easy and paperless.

Since 1977, basys has specialized in benefits administration software for the Taft-Hartley community, providing integrated technology solutions that help trust fund offices, national multiemployer plans and third party administrators accurately and efficiently serve millions of members across the US and Canada.

*To learn more about boosting customer service and efficiency with **MemberXG** from basys, visit basys.com/member*

Give participants 24/7 access to the fund office and get valuable benefits to members in need.



Carpenters Southwest Administrative Corporation

(CSAC) administers benefits for more than **60,000** active and retired participants in Southern California, Nevada, Utah, Arizona, New Mexico, Colorado, West Texas and Wyoming. They have been a basys customer since 2013.

While building trades generally have been designated as essential businesses during the COVID-19 crisis, early on many workers were negatively impacted. Some projects were delayed and worksites closed, and even now there are increased safety precautions and concerns on the job.

Self-service portals provide immediate benefits

When the pandemic's financial impact began to affect members of the Southwest Carpenters Regional Council, whose benefits are administered by CSAC, trustees decided to add an early vacation payout. There was one stipulation: to hold down costs and speed up the payments, participants had to request the payouts and sign up for direct deposit via CSAC's **MemberXG** self-service member portal.

CSAC was already actively enhancing member service with **MemberXG**, which has many features basys customers found especially essential during the COVID-19 crisis. Fund offices can use the portal to **connect plan participants and dependents to updated benefits information and status from anywhere, on any smartphone or PC, 24 hours a day, in English or in Spanish**. Members can enroll in benefits, download documents, reprint EOBs and ID cards, edit their contact and dependent info, run pension projections, submit electronic signatures for many documents, even make self-pay and COBRA payments.

At CSAC, the COVID vacation benefit was an added incentive for many new users to register for the portal. CSAC promoted the portal and new benefit on their website, coordinating messages with the Regional Council, who used their robust and active social media presence to spread the word to participants. They posted quick videos showing new users **how easy it is to register for and use the portal**, as well as how to sign up for direct deposit and apply for the early vacation payout.

After-hours access, online enrollment, changing demographics, pension applications... there are many ways the portal is an added benefit for participants

When the crisis began, more than half of CSAC participants were signed up for their member portal. Within a month of launching the new benefit, **more than 80% of the active participants**

in CSAC's database had signed up for the portal, driven by the vacation payout and other COVID-19 related benefit inquiries. The organization collected almost 9,000 cell phone opt-ins to send members periodic SMS benefit alerts.

As a result of the trustees' decision and the CSAC team moving quickly to get the most from their basys member portal tools, thousands of SW Carpenters were able to take advantage of a much-needed early vacation payout.

Great service in good times & bad

COVID-19 highlighted the need to connect with plan participants quickly and securely. But crisis response is just part of the advantage a full-featured self-service portal like **MemberXG** offers.

At CSAC, more than 32,000 users (and counting) now have after-hours access to benefits information from their smartphones. They use it to complete online enrollment, update dependents and contact info, even submit pension applications and upload documents. It's an advantage every member deserves.