WHAT'S NEW

BASYS PLATFORM PRODUCT
Features & Enhancements

SPRING 2025

MemberView – NEW!

- Unified and modernized new member portal serving both ISSI and BASYS customers
- New, mobile-first UI/UX
- Enhanced log in security and password support
- Re-designed self-service configuration tool to help you personalize and tailor your member site without requiring tickets or waiting for customer support or development
- Standard functionality includes Beneficiaries, Claims, Demographics, Document Center, Eligibility, Pension, Work History, and more
- New Mobile App for both Android and iOS

FundOffice

- Updated member merge to include member bank information
- Updated Classic Benefit Plans screen to Service
- Enhanced member Eligibility matrix display and Rate Table column/row index descriptions
- Generate dependent alternate IDs from a custom routine
- Search for comments in the Correspondence Viewer
- New CDI subroutine converts loaded Alt ID data to SSNs
- Member and dependents alerts now display for MBI number updates
- New Address Line 3 control to help determine non-U.S. addresses
- Improved searching for reference numbers within Batch Entry
- Contracts improved user experience for App Conversion, Modifier Values, and Linked Funds
- Batch Offerings table improvements
- Eligibility: Added rate table export, new display and actions, summarized view, and HIPAA Options 5 report enhancements
- Updated Classic Funds, Groups, and Subgroups screens to Service and enhanced ACH Drafts options
- Updates for routing number validation, correspondence enclosures, next action, and encrypted bank information display
- Standardized permissions in the Authorization Role Editor
- Run Outgoing Reciprocity by Deposit Date
- Made it easier to view Enclosure data checks by displaying them in a pop-up window
- Added four new data checks to set default dates for enclosures
- Track Gender and Sexual Orientation Information
- A new security setting controls if you can create COBRA occurrences for members or dependents without prior eligibility
- Check Number Field Length Increased to 30 Characters
- Manage Check Drafts in Service with a new screen and quality of life UI elements
- Track Dependent Effective Dates Action Date/Time and Operator
- Enhanced Employer Demographics, Employer Contributions, and Dependent Status Loads
- New Dependent Alt ID Load
- New user interface for Special Handling Codes
- Ability to encrypt Employer Bank Accounts
- Improved performance of Premium Billing Roster Management

HealthClaims

- Resolved issues with the disability check print process, check counters, and batching of checks
- Fixed the check date functionality and implemented a custom routine for LTD payments
- Corrected SSN and name errors on reports, completed code reviews, defined file dictionaries, and fixed runtime errors
- Updated Direct Deposit Tap window
- Created necessary dictionaries for better data management
- Resolved issues with prior paid adjustments through manual transaction entry
- Ensured PPA values update correctly when no CLM-MEMBER record exists
- Resolved issues with MEMBER-WH-TYPE being overwritten
- Ensured the Disability Void process correctly points to MEMBER-WH-TYPE
- Fixed errors in manual transaction entry, batch transaction entry prompts, and member selection
- Ensured irrelevant data is cleared during batch transactions
- Updated the Dictionary to provide accurate information on the TD on DIS sac window

WHAT'S NEW Product Features & Enhancements

95 Updates introduced with recent releases

Pension*Benefits*

- New touchpoint for Pensioner direct deposit file customization
- New Annuity check processing touchpoints for custom withholdings calculations
- Streamlined Pensioner Void and Reissue process by including multiple reissues for the same member in the same check run
- Pensioner Demographics data load enhanced to include Retain Type and W-4P withholdings
- Pensioner Demographics data load now validates bank routing numbers
- Effective Date and Award date now included in the pensioner precheck export file
- Pensioner Pre-Check validation that bank info is present when required
- Decrypt pensioner bank information for reporting
- New Pension touchpoint for custom member selection subroutines
- Enhanced Disbursements History with new view for performing bulk actions on disbursements including voids, reissues, and reclamations
- Enhanced void process to track updating withholding members when processing void, unvoid, void again, or reclamation actions
- Ability to secure separate permissions for Disbursements History actions
- New Pensioner Detail Report touchpoint for customized record exclusion
- Enhanced Pension Schedule options
- Enhanced Pension Scenarios table
- Authorize pension action codes
- New data fields on Pension Actuarial
- New Batch Pension Prep prompts for types to include and default age to use per type
- Transfer Annuity balances by deposit date
- Member Accounts balance reserve process
- Member Accounts transfer process enhancements
- Member Accounts Batch Payment Update enhanced to add withholdings for new payees
- New Member Accounts Summary subtab summarizes transactions by year
- California tax calculation
- Pensioner and Member Accounts integration with W-4P withholdings – enhanced disbursement sequence user interfaces and disbursement processing
- Enhancement to select Member ID format to use in Member Accounts/Pensioner check vendor files
- Pensioner sequence user interface enhanced to work with centralized member bank information - Print Checks, Direct Deposit, Pensioner data loads, and converting bank information from pensioner file to member bank information file
- Automatically create beneficiary pensioner disbursement record
- Pensioner sequence fund selection enhancement for direct debit processing
- Pensioner 'pull check' enhancement
- Export Pensioner Pre-Check report to Excel - full precheck and Add, Drop, or Change precheck
- Sort Pensioner Pre-Check by AltID
- New fields for Pensioner CDO report

Writer

- Race and ethnicity data source updates for Member and Dependent
- Gender and sexual orientation data source updates for Member and Dependent
- The Processes screen has been improved, now featuring a new Export button that allows you to export and save items in the data grid
- Added the Alternate ID data elements to additional data sources
- Added Deposit Date, Total Reported Amount, and Remit Status attributes to Employer Delinquency
- Enhancements to the Template Configuration interface designed to streamline the configuration workflow via new Process to Template Link screen and Template to Process tab
- Additionally, the Copy Template and Delete Template buttons provide specific roles with access for added security
- Print Management Screen now has more securitization optionality based on roles
- Print Management screen includes a Reprint button, allowing users to reprint documents that have already been printed

BASYS by BRIDGEWAY

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Employer

- Added Multifactor Authentication for additional security. Includes access code messages and expiration time
- Employers are now able to reset their Employer password independently using Forgot Password, saving your fund office time with helping recover portal accounts
- Hide the 'Other' portal payment method if your employers don't use it
- Updates to the display of receivables and notification emails
- New industry standard password requirements and updated CAPTCHA
- Improved usability

YEP

- 1095C Reporting for Fund Offices

Customer input, industry evolution, and advances in technology drive every new release at **Bridgeway.** Our extensive product roadmap is released each spring, with 95 new products, features, and enhancements unveiled for 2025.

Assurance
a Bridgeway SaaS program

> A Bridgeway Software as a Service (SaaS) program for BASYS customers that makes it easier to stay current and get the most from your platform.

BASYS by BRIDGEWAY