

Voice of the Customer Sessions:

How to Prepare

Bridgeway looks forward to seeing you next week in Reno. To help you get the most value from our unique Voice of the Customer sessions, we want to ensure your perspectives help shape the future roadmap of Bridgeway's benefits administration platforms. The best way to prepare is for your team to review and discuss the session topics in advance. Sessions will feature engaging live polling and opportunities to share immediate feedback using a smart device or computer.

Breakout groups will focus on specific specialties within your organization, including contributions and eligibility, claims, and pension. Please be prepared to discuss the topics through the lens of each focus area. As a reminder, preregistration is required for all Voice of the Customer sessions.

VOC 1 | In the Cards: BASYS Updates & Insights

This customer-focused session takes a closer look at what's ahead for the BASYS platform, previewing upcoming capabilities and discussing the value of staying current with Assurance while sharing feedback to help shape BASYS's ongoing evolution.

Discussion topics in this session will be broken down by BASYS module – **FundOffice** (contributions/eligibility), **HealthClaims** (claims), and **PensionBenefits** (pension). Please consider the following:

FundOffice

- Contributions
 1. What are the biggest challenges faced when making Contract changes/updates?
 2. What reports are most often used in the Contract update process?
 3. What workflow is most utilized when making Contributions Adjustments?
 4. What reports or displays are used when balancing Contributions and what would most improve the process?
- Eligibility
 1. Is your organization utilizing the Dependent Disclose for all PHI tracking?
 2. What type of information does the fund need to track for a member or dependent around PHI? Where would this information be most useful to display?
 3. What workflow is used to reconcile eligibility payments?

HealthClaims

- Automated Batch Check and EOB Processing
 1. What method do you currently use to print checks/EOBs?
 2. Do you currently use any form of automated check/EOB processing?
 3. Do you have any reservations about employing automated check processing in the future?
- Claims Rules Engine
 1. Describe your interest in having a user-driven rules engine (front end) that provides more flexibility to define claim outcomes based on your fund's own business rules.
 2. Are there any examples of business logic that can't be configured with the standard Benefit Plan/Schedule/Bcode Configurations?
- Realtime Eligibility and Claims Status Transactions
 1. Describe any integration you have with a clearinghouse or other vendor to host Realtime Eligibility/Claims Status transactions.
 2. Has your Shared Administration Agreement trading partner expressed interest in exchanging 270/271 (eligibility request/response) and 276/277 (claims status) transactions?

PensionBenefits

- If we developed another projection method to offer in **MemberView**, would it be required to also add the new method to Pension DB's Scenarios subtab? If yes, why?
- Disbursements
 1. Do you use a print vendor like Zelis to print checks or direct deposit receipts? If not, why not?
 2. How many pension checks do you print and mail in-house monthly?
 3. How many pension direct deposit receipts do you print and mail in-house monthly?
 4. How often do you process Annuity/Member Accounts disbursements?
 5. When you process these disbursements, how many checks and direct deposit receipts do you print and mail in-house?
- We're considering enhancements to automate sending your ACH and positive pay files to your bank.
 1. Who do you bank with?
 2. How do you upload files to the bank today? Is SFTP protocol used?
- Do you currently administer or are you considering implementing a benefit plan that has a cap on the amount of money that can accumulate in a member account and when the cap is hit, redirects contributions to accumulate in a new, different kind of "bucket?"

VOC 2 | Dealer's Choice: ISSI Updates & Insights

This interactive forum orients ISSI customers to the latest developments and direction of the ISSI platform, gathering input on desired Encompass library enhancements, sharing an update on the upcoming ECHO letters solution, and fostering peer to peer discussion to help drive Bridgeway's development roadmap.

In preparation for this session, please consider the following:

- Which functions would you like to self-service in ISSI – SFTP configuration changes, 834 group structure updates, workflow management, or letter template updates?
- What letter templates in ECHO, Bridgeway's new letter customization solution, would have the most impact on your office?
- What ISSI enhancements or changes would you like to see?

VOC 3 | Winning Hand: Strategies for Member Engagement

This collaborative session focuses on the continued evolution of member engagement at Bridgeway, revisiting today's MemberView tools, previewing the roadmap, and bringing customers together in small-group discussions to compare experiences and help guide what comes next.

In preparation for this session, please consider the following:

- What member outreach tools do you have available to you?
- If you don't have any member outreach resources, what's the blocker?
- What outcomes, tracked by metrics, are your trustees expecting from a member portal?
- What features would you like to see in a member portal that you don't currently have?

VOC 4 | Betting Big: The Future of Connected Workflows

This interactive session invites Bridgeway customers to help shape the next generation of intelligent workflows through an introduction to the new Prism reporting and analytics solution, a preview of the future workflow vision, and breakout discussions exploring end-to-end processing opportunities by fund office focus area.

In preparation for this session, please consider the following:

- What workflows does your team rely on every day?
- What is on your wish list for workflows?
- Where do workflow handoffs, follow-ups, or coordination create friction?
- If you could create your own automated workflow, what would it accomplish?