

# RGB Benefits™

A PACKAGED DOCUMENT MANAGEMENT AND WORKFLOW APPLICATION  
TOOLSET FOR PENSION ACCOUNT MANAGEMENT PROCESSING

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## OVERVIEW

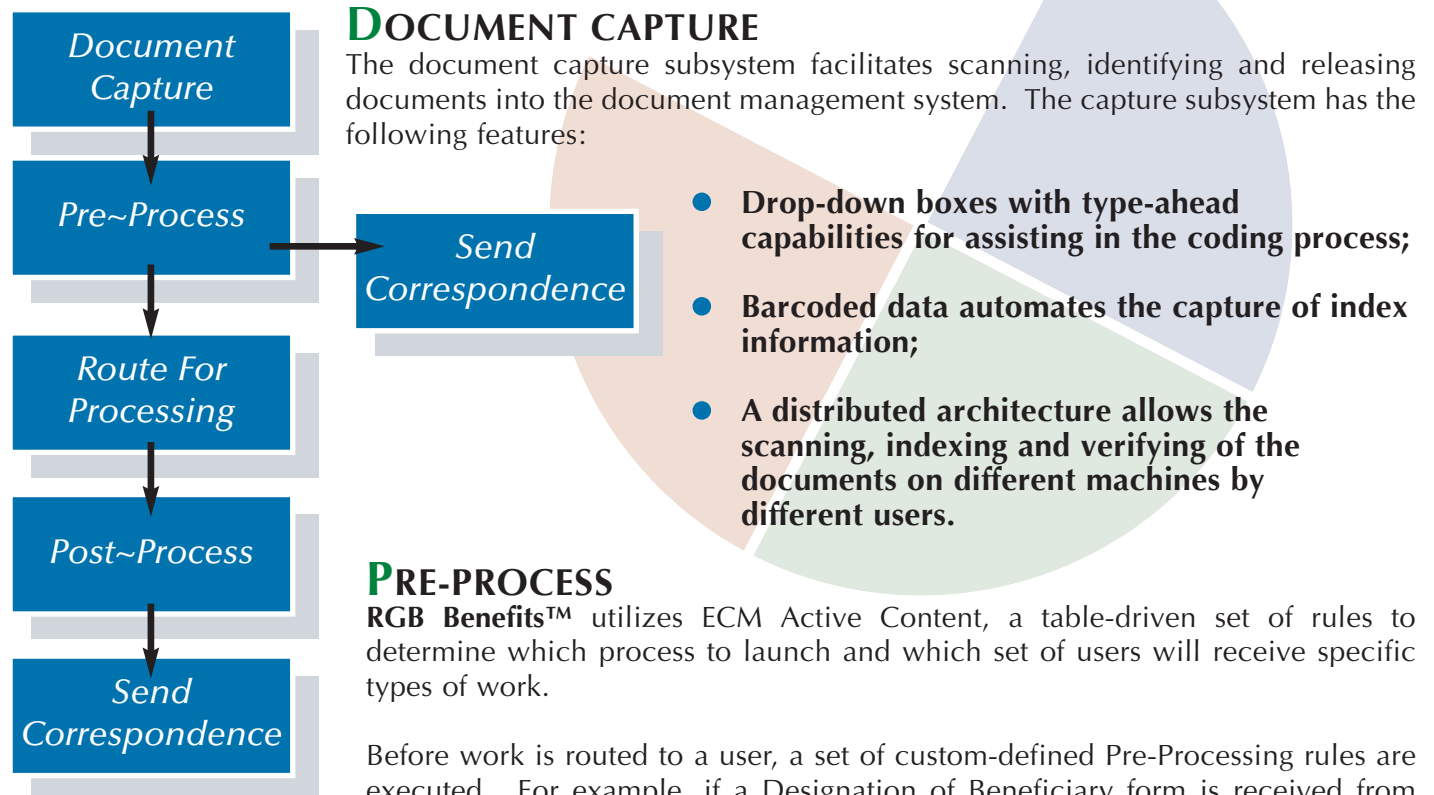
As a pension administrator, you are faced with multiple challenges in achieving your job objectives. Managing documentation and phone calls, tracking account changes, auditing those changes, and meeting the customer demand are only a few of the hurdles.

With **RGB Benefits™**, a comprehensive tracking and servicing package for pension administration, member requests are managed quickly and accurately. In a secure and consistent yet flexible fashion, **RGB Benefits™** reduces costs and increases control of member benefits management.

## THE “ONE-TOUCH” PROCESS MODEL

**RGB Benefits™** applies the “One-Touch” Process Model to all of the business processes. Having a consistent process model makes developing, deploying and maintaining the processes faster and more reliable. The model has a very simple goal: once a document from a member is ingested into the system, it should require only one person to look at it once (“One-Touch”) in order to complete processing of the request.

***RGB Benefits™ is a fully tested and documented application that reduces cost and implementation time resulting in a superior and rapid ROI.***



## PRE-PROCESS

**RGB Benefits™** utilizes ECM Active Content, a table-driven set of rules to determine which process to launch and which set of users will receive specific types of work.

Before work is routed to a user, a set of custom-defined Pre-Processing rules are executed. For example, if a Designation of Beneficiary form is received from a member enrolled in a plan that does not provide continuing benefits, the Pre-Processing rules will automatically generate a letter (via the Correspondence Engine) stating the plan type they've selected does not provide for beneficiaries.

## ROUTE FOR PROCESSING

After Pre-Processing, work is routed to a queue. Access to that queue is managed by a table-driven interface that controls which processes the user can access. The user configuration may be set in "Browse" mode or in "FIFO" mode. Behavior of the user interface depends on whether the site is operating in "Store and Forward" mode or "Realtime" mode.

In Store and Forward mode, the user enters the member's request in a customized form tailored for that process. UI templates in **RGB Benefits™** exist for most standard processes, such as Address Change, Beneficiary Designation, Benefit Estimate, New Enrollment, and many others. When a user enters member data into the UI, the system will store that data and automatically update the pension administration system in the Post-Process phase.

In Realtime mode, the native host interface for the site's pension administration system is integrated into the system. The user enters the member's data into the native interface and dispatches the item to the Post-Process phase.

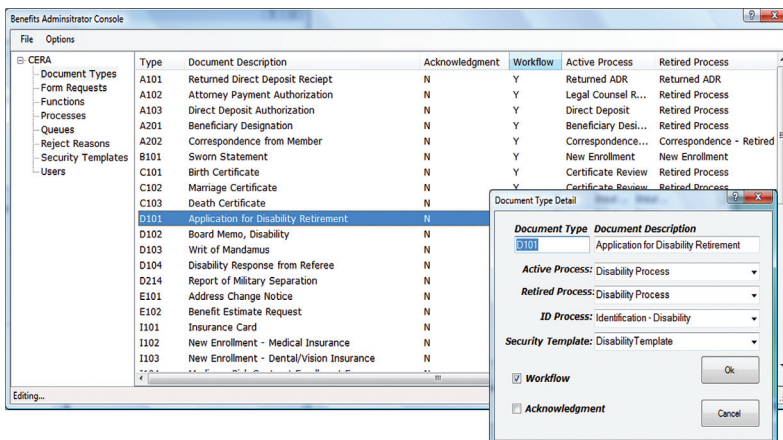
## POST-PROCESS

Post-Process activities depend on the processing mode. In Store and Forward, the work is queued for update. Exception-handling procedures are built around these updates.

Other Post-Process activities may include triggering additional workflows, sending alerts, and/or generating correspondence back to the member indicating whether the request was fulfilled or rejected. Audit trails automatically capture each decision through the entire process.

## CORRESPONDENCE ENGINE

The Correspondence Engine is a module that creates custom forms and letters. The engine can be inserted as a step anywhere in a workflow process. It uses document templates authored in Microsoft Word™ or Sun OpenOffice™. It prints the correspondence, and adds it to the ECM in either TIFF or PDF format. Each letter or form produced includes a cover sheet with instructions for the mailroom - for example, if a New Enrollment confirmation is being sent, the cover sheet may include instructions to add a Welcome brochure along with the letter.



## ADMINISTRATIVE CONSOLE

An intuitive administrative console simplifies the task of managing **RGB Benefits™** custom business objects.

The Benefits Administrator Console allows administrators to configure system business objects. In the *screen shot* pictured, a Document Type object is being edited. The Document Description is stored and the appropriate process, Active or Retired, will be launched when a document of this type is

entered, for an active member or a retired member, respectively. The Security Template controls access to documents of this type (in the case here, only personnel in the Disability area will have access to this document). Document workflows are launched based on the checkboxes selected.



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