



Neospin™ Deploys Comprehensive Web Self-Service Functionality

Do you want to provide information and services to members, employers and third-party administrators (TPA) through self-service channels? If so, you are among the majority of pension organizations that want to become more operationally efficient while simultaneously providing better service. Our Neospin™ pension administration solution provides secure and easy-to-use online self-service access to a variety of different stakeholder through any preeminent web browser.

Web self-service equips your stakeholders with the ability to answer their own questions, process their own requests, and enter data and resolve business validations on behalf of your staff. We can deploy web self-service all at once, or, as happens more frequently, it can be rolled out in stages to include various features or target different stakeholders. By way of example, some customers initially deploy member self-service to reduce 80 of the common phone calls or email inquiries. In a subsequent deployment, they might choose to include more extensive functionality such as straight-through service purchase processing or disability processing (including a secure physician portal). Since our self-service portals use the same code base as our Neospin™ PAS, the portals support the same member, employer or TPA functionality that staff perform in the line of business solution. The only difference is your external stakeholders are in charge of initiating and executing the service requests, allowing your staff to focus on other high priority tasks.



Typical Self-Service Features

e-Forms Processing

With E-Forms Processing, users submit data using online forms with real-time, rule-based validation, and the system provides decision tree questions for complex decision processing (wizard). E-Forms that need to be submitted to your imaging solution are presented to self-service users in a final step as a summary document they must 'accept' or 'confirm' for submission to you. Those summarized forms are then printed and signed, if a wet signature is required, or converted into PDFs and stored in the ECM with appropriate index information if an authentication-based e-signature is acceptable.

Workflow

Neospin™ allows members and employers to participate in workflows. Workflows are initiated from Web Portals when self-service users create a 'contact ticket' or when they then complete a transaction that requires involvement from you. Self-service users are notified of activities they need to complete using Neospin™ alerts and notifications that are published to the Web Portal. Workflow provides integrated rules-based routing and processing between you and your customers.

Queries and Reporting

This function provides query capabilities for employers to access their data set, including export to Excel functionality, if authorized by you.

Appointment Scheduling

Neospin™ allows members to self-register for meetings you provide.

Secure Authentication and Authorization

Neospin™ typically incorporates Entrust IdentityGuard into its self-service architecture. This provides multi-factor authentication (used by leading banks and financial institutions) using a combination of machine credentials, image verification, and a series of pass phrases.

Secure Communication

Neospin™ generates e-mails directing external users to access the secure portal to view items requiring action. Alerts, messages, and correspondence (in PDF) can all be made available to the Web Portal.

Single LOB Code base

Neospin™ allows any LOB process (batch or online), computation, or data to be deployed to self-service participants without having to manage separate software code or data. This includes the enforcement of business rules and validations.

Educational Services

Neospin™ implements educational services by providing 'clickable' links to content (streaming videos, brochures, and presentations). For proactive communication, Neospin™ uses its rules engine to generate Web Portal alerts or messages with 'clickable' links to access specific content you create.

Video Presentations

Neospin™ provides access to video presentations for 24x7x365 training. These are available on the Web Portals as a 'clickable' link to access content you create.

Error Reporting and Feedback

Neospin™ provides self-service users with a tool (called NeoTrack™) to report errors or suggestions for enhancements. This same tool is available for internal users directly within Neospin™. Submissions are stored in a 'blog' like format so users can see the history and status of the suggestion. Submissions are tracked through resolution using various statuses.

Over the last decade, Sagitec has implemented web portals for 18 different pension agencies in the United States and abroad. If you are interested in seeing how Neospin and web-self service integrate with one another, please schedule a free demo. During the demo, you will see how external stakeholders use the portal to perform high frequency business processes, such as contribution reporting and submitting a retirement application. You will also see an internal staff view that will illustrate how Neospin and the self-service portals integrate and share data in a safe and efficient manner. Schedule a free demo now at <http://www.sagitec.com/neospin/pension-administration-software>

