



# Benefits Management and Administration

## Secure Intranet Portal E-Forms Authoring Solution

### IT Objectives for Benefits Management

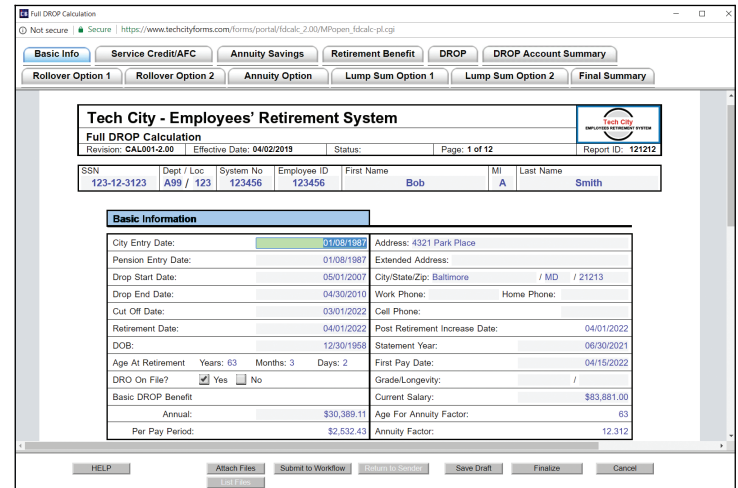
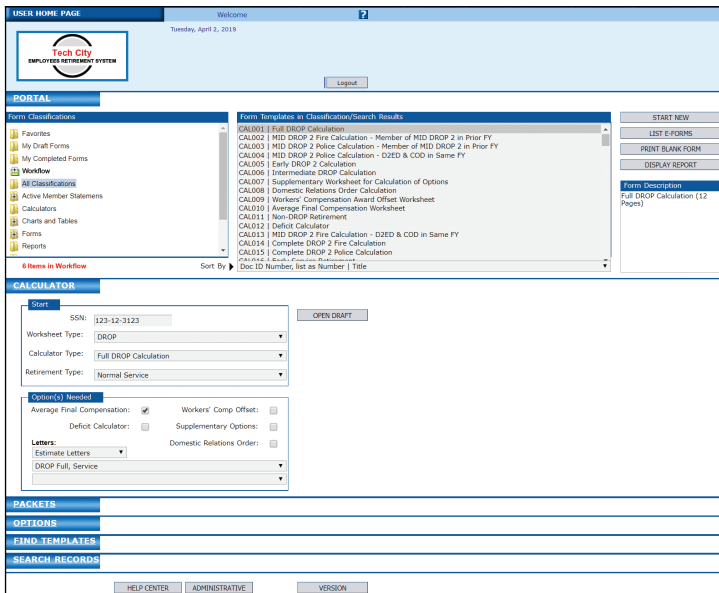
So how does a CIO automate and streamline the established procedures and processes? Office software is too general and disconnected. Packaged pension system software can be inflexible and costly to customize. What is needed is a simple way to automate the procedures that skilled benefits analysts already know and do, and to capture the results into database tables that can be used to print documents, reports and statements. The primary complaint from Members is that it took a long time (30-90 days) to get a benefits estimate when a retirement date was contemplated. The gateway to that solution turned out to be electronic forms, which allow for the automation of everything practical that is related to Benefits Management and Administration.

- Secure Intranet Portal to Automate Active and Retired Member Benefits Administration (includes Intelligent Electronic Forms, Worksheets, and Calculators)
- Workflow and Process Integrity Management
- Reporting and Controls for Executive Management, Administrative, and Actuarial
- Electronic Signatures
- Generate Active and Retired Member Statements
- Process Retirement Benefit Payments (Interface to ADP for Retiree Payrolls)

### Amgraf's Secure Online Retirement Planning Software

Amgraf's OneForm Designer Plus (OFDP) is an e-forms authoring tool that starts with a business form, form-based procedure, or imprimable document. Next, the document image is automatically generated as an e-form that is really a templated software application. It is then easy to interface the e-forms to web services for data merging, digital signatures, workflow, and many other IT functions. Using OFDP, paper forms can quickly be converted to e-forms and/or fillable PDF forms with the following benefits:

- The look and feel of the paper form is preserved. This reduces design and training costs, and allows users to gracefully migrate from paper to electronic forms as needed.
- OFDP HTML electronic forms (sometimes called Internet forms) work great with all the popular Browsers.
- Existing form designs can be imported from Word and PDF files.
- Fillable E-forms and PDF forms can be connected to databases, linked together, e-mailed, and electronically signed and secured.
- When needed, a paper form can be printed on-demand.
- No client-side filler-license software or license fees are ever required to use electronic forms created with OFDP.



E-Forms provide the ability to highlight required fields, perform mathematical calculations, and validate data as it is entered, completeness and accuracy are ensured at the point of entry. Dropdown select lists can be dynamically populated from database tables. Back-end processes can be instantly triggered upon form submission and e-forms can be automatically routed to the next step in the workflow.

