



TRUSTpartner

Revolutionizing the Business of Benefits Administration

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Company Background

Trust Benefit Technologies was formed to design, develop, and support business software applications for the multiemployer benefits industry. Our focus is on self-administered Taft-Hartley trusts funds and third party administrators. Backed by more than thirty years of Taft-Hartley experience, combined with solid alliances with complementary third-party vendors, the Company's HIPAA-compliant products provide simplified administrative solutions for the benefit plans administrator.

Business Objectives and Technology Vision

TBT's *business* objective is to generate predictable, recurring revenues by offering *Software-as-a-Service (SaaS)* to self-administered Taft-Hartley trust funds and third-party administrators. This business model, rather than one that is dependent *solely* on one-time software license fees, distinguishes TBT from its competitors.

TBT's *technology* vision was to architect a world-class, rich internet application (called TRUSTpartner) for its business users. An important outcome of TBT's development effort was to provide a robust, equivalent user experience for large- and small-scale administrative organizations. This goal is achieved by offering affordable *SaaS* solutions that operate in a cloud-based environment. Cloud-based technology delivers an important benefit to smaller trust funds by eliminating their need to purchase and then take on the responsibility of maintaining a complex and costly in-house technology platform.

TRUSTpartner Design Objectives / Technology

- ✓ Architected as an Internet-based solution from the ground up
- ✓ Meet or exceed HIPAA security requirements
- ✓ Eliminate the need to deploy software on the desktop
- ✓ Allow easy integration with third-party applications
- ✓ Easily integrate electronic interfaces and web services
- ✓ Reduce paper dependencies by subscription to electronic versions of forms and report

TRUSTpartner Design Objectives / User Community

- ✓ Eliminate handling of same data multiple times
- ✓ Eliminate use of ad-hoc applications (e.g. spreadsheets, MS Access, etc.) outside TRUSTpartner
- ✓ Drive staff assignments through work queues
- ✓ Implement quick-to-learn, easy-to-use point-and-click user interface (UI)
- ✓ Reduce dependency on administrative system "experts"

TRUSTpartner Deployment Architecture

- ✓ Apache/Flex (UI)
- ✓ Java 2.0 Enterprise Edition (J2EE)
- ✓ Jasper Reports
- ✓ Hibernate (persistence framework))
- ✓ STRUTS (server-side framework)

Products and Services

Taft-Hartley Benefits Administration System (TRUSTpartner)

TRUSTpartner is the name of TBT's collection of applications that are in use by self-administered Taft-Hartley trust funds and third party administrators. The following table lists each application and an abbreviated list of features. All applications share a common database, so changes made by one department are instantly available to the others.

APPLICATION	DESCRIPTION
Employer Contributions	TRUSTpartner has a robust agreements administration component that drives the employer contributions application, supporting hourly, percent of wages, and flat contribution rates, as well as premiums that are based on the carrier and family composition. System generates employer bills, assesses LDs and interest on delinquent contributions, generates notices, etc. Employer Contributions has robust reciprocity processing capabilities as well.
Employer Audit	Employer Audit is fully integrated with the Employer Contributions module. For example, when the auditor records the audit findings, the audit findings (differences between findings and what the employer reported) can automatically be loaded to employer contributions. Liquidated damages and interest assessments are performed, and appropriate notices created. Module allows user to establish what the audit protocols are, and then tracks each step of the audit from beginning to end.
Collections Processing	Collections Processing is also fully integrated with the Employer Contributions module. Module tracks delinquent employers and allows user to establish what the collections protocols are, and then tracks each step of the collections process from beginning to end. Module handles payment plans, bills for miscellaneous fees (e.g., audit fees, mileage, attorney fees, etc.).
Enrollment	This module is used to maintain all information relating to the family-composition, contact information, carrier/health plan elections, union local affiliations, etc. Information maintained in this application is available to all TRUSTpartner applications (i.e., information is not stored in multiple tables and therefore, subject to inconsistencies so common in other systems).
Eligibility	TRUSTpartner supports hour bank and premium-based eligibility and is driven by a robust set of user-defined eligibility rules that drive the system. Carrier reporting is performed through 834s.
COBRA Administration	Used to track and maintain COBRA events; creates and tracks all required notices. Application also

APPLICATION	DESCRIPTION
	performs billing functions, premiums collection, and is integrated with the eligibility module.
Pension Administration	Used to compute an active member's vesting and benefit credits, benefit amounts, and more. Allows the user to establish what protocols are followed from the point a member requests retirement through the actual retirement date. Generates monthly benefit payments (as well as interim payments that can be issued "at will" during the month), quarterly and year-end tax reporting forms/files, and is integrated with the eligibility module.
Vacation/Dues Processing	Records contributions to the member's vacation account; keeps track of standalone dues funds as well as dues that may be deducted from the member's vacation benefit based on authorizations. Comprehensive set of reports track all activities related to vacation and dues contributions, as well as windows to display related activity. User can request checks at will (including distribution of late hours/contributions, early withdrawals, etc.).
Correspondence Tracking	Used to record information related to incoming correspondence and phone calls. Tracks who called, identifies which family members were discussed and the subject matter, records mood of caller, etc.

Electronic Employer Reporting (WebERF)

WebERF is TBT's electronic reporting module, enabling employers to submit their monthly reporting information via the Internet. WebERF has three portals: Webmaster, Administrative, and Employer. The Webmaster portal is used to publish announcements to WebERF users, activates new WebERF employers, and is used to generate various statistical reports. The Administrator portal is used to respond to questions posed by employers, allowing the designated administration employee(s) to view the same data the employer is viewing in order to facilitate support calls. The Employer portal is used by employers to submit report forms and/or coupons and schedule payments (via the Automated Clearinghouse – ACH).

WebERF is fully integrated with TRUSTpartner, but can also be licensed as a "standalone" product, allowing integration with the Licensee's legacy employer contributions system.

Professional Services

Services offered by TBT include data conversions from client's legacy applications to TRUSTpartner, setup and installation of the base software products, business analysis to identify changes required to meet client's unique business requirements and related programming, and staff training. If electronic employer reporting is implemented, then TBT will also conduct training classes for employers who will take advantage of this tool.

Custom Websites

TBT develops custom website and if desired, offers ongoing maintenance of the client's web content.

Software-as-a-Service (SaaS)

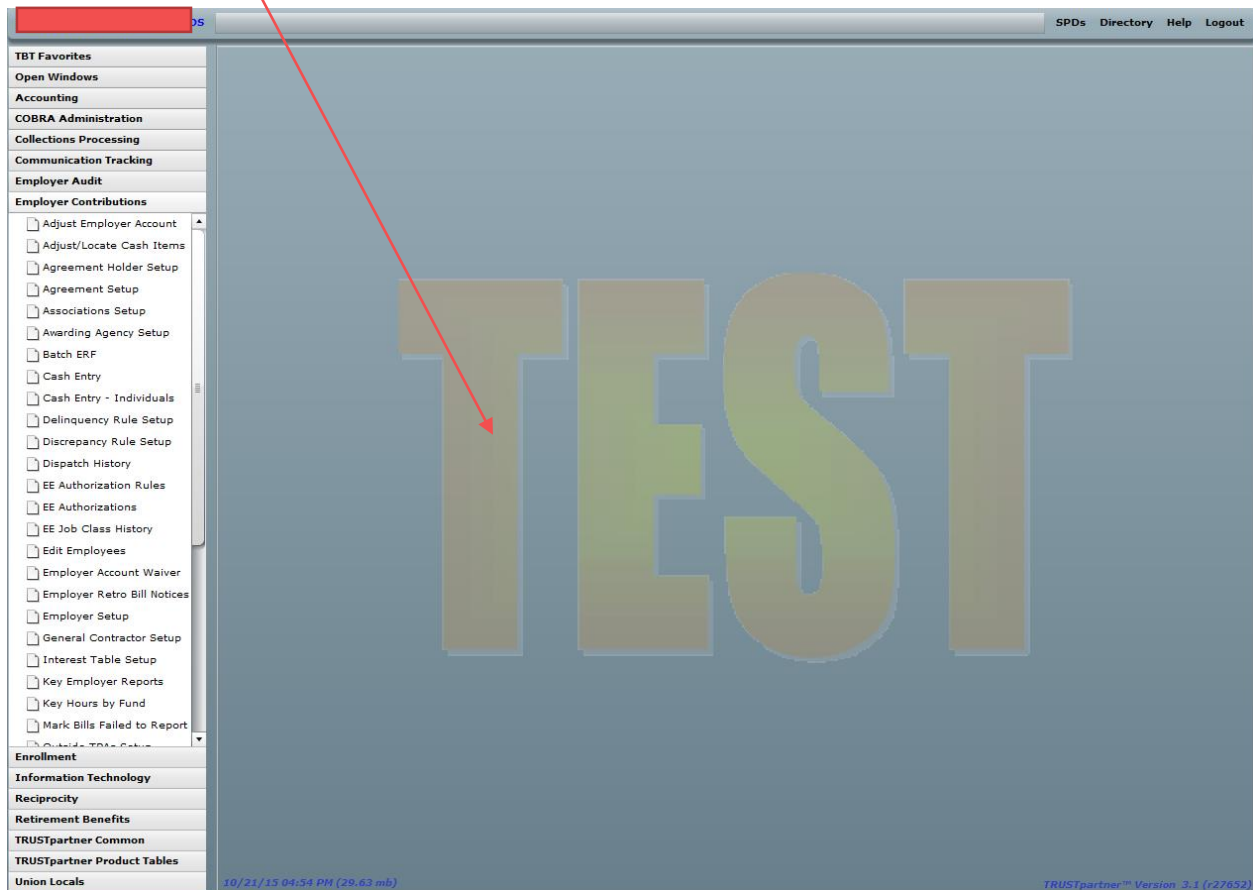
TBT will host its TRUSTpartner and WebERF applications software for a monthly subscription fee, usually based on transaction counts. Bundled in the single monthly fee are server-side processors, maintenance of TBT software and associated third-party software products (e.g., Oracle), software product upgrades, customer support, and daily backup of customer data.

Sample TRUSTpartner Windows

TRUSTpartner Desktop

The Desktop is configured at the time of login; the TRUSTpartner Navigator (left-hand portion of window) is populated based on the role (s) and security credentials assigned to the user.

Logo or graphic for each client (or if a TPA, the TPA's clients) can be placed onto the TRUSTpartner Desktop



Agreement Setup

Insert your own PDFs to assist your staff in the setup and maintenance of product tables

Agreement Setup (INSIDE WIREMEN'S AGREEMENT - 11)

Agreement: **INSIDE WIREMEN'S AGREEMENT - 11 (11-LANECA) (11 IW)** **Business Practices**

Properties | Trust Funds | Rates | Employers | Administration | Miscellaneous | ERF | Setup Complete

Agreement Holder: **11-LANECA**

Agreement: **INSIDE WIREMEN'S AGREEMENT - 11**

Short Name: **11 IW** | Jurisdiction: **11**

Effective: **01/01/1983** through

Agreement Type: **REGULAR**

Trade: **Inside Wireman** [click to view CBA](#)

CBA URL:

Discrepancy Rule: **Standard**

Delinquency Rule: **11 Inside Wireman**

ERF Entry Format: **Standard**

Benefit Bill: Offset **0**

ERF Print Format: **Report Forms - Local 11**

ERF Print Name: **Monthly Payroll Report for Electrical Contr... I.B.E.V...**

Notes

OTA - 09/24/2012 11:15:45 6 of 6

Effective October 1, 2012, the value used for RHP will decrease from \$1.50 to \$1.25 (\$10.59 - \$1.25 = \$9.34).

Rate Column Headings			
Value1	Value2	Value3	Value4
Rate	Value2	Value3	Value4

Employer Setup

Standard search buttons for members and organizations.

Employer Setup - (105 [REDACTED])

General | Billing | Affiliations... | Locations | Agreements | Projects | DWM | DBA | Fringe | Liaison

Account # **1056 1000** ALERTS! (0)

Employer Name: **XYZ Corporation** Obsolete

Employer Status: **Active** 01/01/1965

Phone: **(909) 598-7700**

Fax: **(909) 594-3410**

Address: **1000 Wilshire Blvd
Los Angeles, CA 91789**

Web Page:

Type of Firm: **Corporation** | Established: **01/01/1965** WebERF User

Federal ID: **95-2343434** | State Tax ID: | State License: **CA** | **230813**

JXL - 06/26/2015 10:32:32 37 of 37

Rate Variant 11ER, 11EE, 11WRK was added under the Local 11 9th District Market Advancement with an effective date of 6/1/2015.

This variant is for all Local 11 Employers that have Local 11 employees working under Local 11 Jurisdiction.

Maintain an unlimited number of contacts for each locations of every organization.

Button used to launch popup that shows details of an employer's unapplied cash.

Enrollment

Enrollment - Smith, Sherry (Child)

SSN [REDACTED] Member Name Smith, Susan Merge History Not an employee ALERTS! (0)

Family

- Susan Smith (Self)
- Bill Smith (Spouse)
- Sherry Smith (Child)

Demographics | COB/Medicare | Union Data | Notes | **Granted Eligibility** | Health Election | Other | External IDs

Name: Smith, Sherry Obsolete

Relationship:

Gender:

Marital Status:

SSN: 111-11-1111 Family Sequence: 03

Status: OAD:

Date of Birth: Age: 31 Years 10 Months

Date of Death:

Ethnicity:

Language:

Email:

Phone:

Address Information

Home Phone:

Home Fax:

Effective:

Mailing Address:

Home Address:

Cell Phone:

Work Phone:

Dependent Specific:

Status button used to launch history popups showing f all status changes

Eligibility

View Eligibility

SSN [REDACTED] Member Name [REDACTED] Family Member [REDACTED] Plan: ALERTS! (0)

2011 2013 2015

Eligibility Month	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13
Work Period	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13
Health Plan	11 Health	11 Health	11 Health	11 Health	11 Health	11 Health	11 Health	11 Health	11 Health
Eligibility Class	Act Stand	Act Stand	Act Stand	Act Stand	Act Stand	Act Stand	Act Stand	Act Stand	Act Stand
Worked	160.00	160.00	160.00	200.00	160.00	16.00	0.00	0.00	0.00
Adjustment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Deducted	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Balance	600.00	600.00	600.00	600.00	600.00	516.00	416.00	316.00	216.00
Status	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible	Eligible
[REDACTED] - Active, Unknown 12/01/1998 - Female, 09/23/49 (66 Years)									
Coverage Group	*G***	*G***	*G***	*G***	*G***	*G***	*G***	*G***	*G***
Coverage Group	U*VRL	U*VRL	U*VRL	U*VRL	U*VRL	U*VRL	U*VRL	U*VRL	U*VRL

Click to expand row, revealing individual coverage types (e.g., medical, dental, vision, etc.) and related carriers.

Click row to launch popup window that drills down to details (employer, hours, etc.) that comprise summary totals.

Retiree Setup

Retiree Setup - X

SSN XXXXXXXXXX ALERTS! (0)

Award Distribution | Recipient | Payment Setup | Benefit Change | Payment History | Beneficiary | Lien/Levy | Notes

Pension Plan XXXXXXXXXX

Application Type: **Pre-Retirement Death** | Board Resolution: | Approval Date: 06/09/2015

Benefit Source: XXXXXXXXXX | Award Status: Active | 06/09/2015

Birth Date: 12/01/1961 | 52 Years 1 Month | Award ID: 05757 | Award Amount: 1,061.01

Gender: Male | Deceased: 01/18/2014 | Reference: 05781

First Worked: | Union Local: 000011 | Recipient Type: Beneficiary

Last Employment: | Recipient: 5 XXXXXXXXXX

Past Service: 0 | Benefit Effective: 02/01/2014 | Maximum Months: | Original Benefit: 1,061.01

Vesting Credits: 0 | Benefit Credits: 0 | Months Paid: | Lifetime Benefits (Gross): \$2,122.02 | (Net): \$2,082.02

Retirement Date: 02/01/2014 | Normal Benefit: 1,061.01 | Current Benefit: 1,061.01

Type/Form: Normal/120 Month Guarantee | Payment Status: Terminated | 02/01/2019

To Type/Form: Select... on

Co-Annuitant: Select | Birth Date: | Gender: Select | Deceased:

Special Handling: Select... | Effective: through

Remarks

COBRA Maintenance

XXXXXXXXXX - X

SSN XXXXXXXXXX ALERTS! (0)

09/01/2014-Loss of Eligibility, not eligible for COBRA
03/01/2014-Reduction in hours of employment

Qualifying Event Detail

Event Type: Loss of Eligibility, not eligible for COBRA | Event Start Date: 09/01/2014 | Coverage Lost: 08/31/2014

Election Due: | Maximum Coverage Thru: 08/31/2014

Payment Due: | Status: | Status Date:

Eligibility Class: COBRA (11 Health) | Coverage Group Lost: Select

Milestones | Election Form | COBRA Elections | Coverage Election History | Payments

Date	Milestone Description	Milestone Reason
08/25/2014	HIPAA Notice Sent	

Alerts can be attached to participants and organizations; Alerts automatically pop up whenever the participant or organization ID is keyed.

View PDF copy of invoice that was sent to the participant by clicking PDF icon