Cold System Saves Union Benefits Fund 60 Hours Per Month

Implementation of a new computer output to laser disk (COLD) system is saving staff at the New Jersey Carpenter's Funds (NJCF) about 60 hours per month that they can now devote to member service. In the past reports containing critical information such as health and pension contributions and medical claims were printed and stored in filing cabinets. Perhaps 60 times per month, NJCF employees spent 45 to 90 minutes searching through these archives in order to obtain records needed to handle member inquiries or for other purposes. In order to save time that would allow employees to improve services to members, Steve Charney, Management Information Systems Manager, and Ben Camacho, Office Manager, led the implementation of a COLD system that transfers reports directly from the NJCF's AS/400 host computer to a PC server where they are stored and can be accessed by searching on any field. "Our people can now get the information they need to service our members in a minute or two rather than the hour or so it used to take in the past," Charney said. "The savings add up across our entire organization, freeing up a huge amount of time for more proactive activities. At the same time, we are saving money by reducing the space required to store paper reports."

The NJCF is the combined name of the New Jersey Carpenters Pension Fund, Annuity Fund, Health Fund and Vacation Fund. These funds were established as the result of collective bargaining agreements between the unions of the United Brotherhood of Carpenters & Joiners of America (UBCJA) and various employer organizations throughout the State of New Jersey. All funds are administered by a joint board of trustees consisting of an equal number of employer and employee designated trustees. All benefits are provided from fund assets that are accumulated under the provisions of the collective bargaining agreement and trust agreements. The NJCF administers and provides medical benefits through the Health Payers Coalition (HCPC) that has used the strength of its membership to develop a preferred provider network of hospitals, physicians, and other health care providers. The HCPC network includes 80 New Jersey hospitals and over 10,000 physicians.

"The savings add up across our entire organization, freeing up a huge amount of time for more proactive activities. At the same time, we are saving money by reducing the space required to store paper reports."

Steve Charney
MIS Manager
New Jersey Carpenters Funds

Industry:
Insurance/
Benefits

Metafile Solution:
AS/400 Integration
Accounting
Customer Service
Payroll
Correspondence

NJCF Profile:
A defined benefit pension plan representing Industry employers, Carpenters and Millwright Local Unions and District Councils in the State of New Jersey

Established in 1958

METAFILE
Capture
Organize
Index
Deliver

http://mv.metafile.com

Difficulty accessing historical documents in the past

All of the NJCF's operations are managed on an AS/400 using a series of custom applications that were developed internally. These applications produce a wide range of reports such as a check deposit list, pension annuity contribution register, vacation reports, medical claims listings, general ledger and financial statements for each fund. Staff members need to access this information on a regular basis, such as when a member calls for information on a medical claim or an employer has a question on a pension contribution. In the past these reports were filed in cabinets in two storerooms. When a service representative took a call that required research, they went to this room and searched through the cabinets to find the right report. Then they took the report, which could run hundreds of pages, back to their desk and paged through it to find the information they needed. Finally, they had to go back to the storeroom and file the report. This process typically took between 45 and 90 minutes to complete. In some cases reports were misfiled or lost, and then a much more lengthy process was required to locate or re-create them. Each of NJCF's three main departments: 1) pension and annuities, 2) health and 3) collections, spent something in the neighborhood of 20 hours per month on this type of research.

NJCF management was also concerned about the effect that archiving documents on paper was having on its ability to service its constituents. When a member called in for a question that required research, for example, instead of providing an answer right away the service representative had to take down their information and call them back in an hour or two. During busy periods, the number of inquiries awaiting research could stack up to a point that the inquiry might not be resolved for several days. By law, the NJCF is required to maintain most of these documents for at least seven years. As a result, the number of documents maintained by the organization continued to grow, occupying approximately 800 square feet at their peak. The cost of maintaining this space grew over the years as leased space costs rose. Another concern was the cost of the paper and ink required to print the reports each month.

Considering options

Charney and Camacho evaluated a number of potential solutions to these problems. They took a serious look at microfiche but concluded that the time involved in searching for the information would take as long as with paper files. They also were concerned about the cost of converting their reports to microfiche through a service bureau. "Then Strategic Business Systems, a long-standing IT vendor whose opinion we have a great deal of respect for, approached us with information about Metafile's solution to this problem. The basic idea of COLD is to capture the information from the AS/400 and store it on a server that can be easily accessed by users throughout our organizations. I had heard of solutions along these lines in the past that were very expensive and difficult to implement. But Mitch Gottlieb of SBS said that Metafile was different so I decided to take a look."

MetaViewer Enterprise captures, organizes, full-text indexes and delivers personalized content to the entire organization, efficiently, securely and accurately to help improve customer service and reduce costs. The easy to use interface puts only the information needed in front of the user and can be personalized for each department. Even entry-level users can be presented an interface to match their daily tasks, greatly reducing training and support costs while improving productivity. Once the documents are in the system, they can be retrieved using a wide range of standard search tools and customized searches over a LAN, WAN, company intranet, or the Internet. Features include a fast and robust full-text index and search engine, simple Internet Explorer-like user interface, document security at the document and page level, extensive document annotation tools, and email notification of new documents.

Implementing the COLD system

"We visited a couple of SBS's other clients that were using Metafile, and came to the conclusion that it really could do what Mitch said," Charney said. "So we made the decision to move ahead with this solution. We worked together with SBS on the installation, and we have now taken over responsibility for administration which is really not a very big job." Metafile's Windows-based, menu-driven download software manages the downloading of host spool files from the AS/400. The program works by reading the spool file and converting it to the compact, searchable file format that resides on the Windows NT server. No host code changes are necessary. Using this host download program, the administrator specifies which reports should be archived, when and how often downloads should occur, and what should be done with the spool file once it is downloaded.

"We indexed close to 100 reports that cover everything that our service representatives need to access on a daily basis," Camacho said. "Now our people can call in the documents they need almost instantaneously by typing a social security number, contractor code, check amount, member or contractor name, or whatever information they have at hand. Our service representatives love it because they are typically people that enjoy helping a member with a problem much more than rummaging through a storeroom. Giving them quick access to information makes it possible for them to resolve the vast majority of inquiries in a single phone call without having to call the member back or even put them on hold. All totaled, we estimate that we have freed up about 60 hours a month that we used to spend on research and can now devote to meeting members needs. We are also gradually reclaiming the storage space devoted to paper files. We can't get it all back immediately because it would have been too large a task to recreate all of our old reports. But as our reports go past the seven-year mark, we dispose of them and free up the space. This solution works so well that we are now in the process of expanding it by implementing additional Metafile modules that will allow us to scan and index incoming paper documents such as invoices and medical claims. Giving our people the ability to access those additional documents from the same interface will provide additional significant time savings."

> "Our people can now get the information they need to service our members in a minute or two rather than the hour or so it used to take in the past,"