Retiree Billing Software Flexible. Intuitive. Happy.

You offer retiree benefits because you want to take care of those who contributed to your success. It's a nice thing to do, and ideally, it should be easy. With Travisoft, it is.

We create positive experiences for both the employer and the retiree. Our system is flexible, intuitive and smart so you can spend less time on manual tasks, and more time providing great service.

BELOW ARE 10 WAYS TRAVISOFT KEEPS TPAs, EMPLOYERS AND RETIREES HAPPIER.

1 SPEED. Track benefit assignments, due dates and terminations, and also generates notices.

2 FLEXIBILITY. Customize systems and processes for each employer, and retiree groups within an employer, with more than 160 options! We offer the most flexible platform in the business!

3 CAPABILITY. Manage retiree billing, COBRA and any other type of direct billing from one simple platform.

4 SCALABILITY. Manage more clients using fewer resources. Streamline complex processes with report generation, automatic letter generation, payment import, and client logins.

5 EASE. Employers and participants are able to view information online, run their own reports, and view communication. They can also choose from digital options self-service options and manage renewals online.

6 ACCURACY. Say NO to human error, oversights, redundancies and frustrations.

7 BILL-ABILITY. Our platform automatically tracks billing and payment amounts, calculates subsidies, and allows for annual, quarterly and monthly billing options. You can set up recurring billing with a scheduled end date. You can also set up a payment grace period and an automatic termination date for non-payment.

8 MANAGEABILITY. Easily add, edit and view participant details. With importing, payment options, notes, user tracking and a participant view, nothing slips through the cracks. You can even establish multiple retiree classes, within the same employer, setting different rules for each.

9 REPORT-ABILITY. Run reports for benefit plans, ledgers, disbursements, and more. If you are a TPA, you can allow your employer clients to run their own reports or to create report subscriptions.

10 USABILITY. With complete training, coaching and support, your team will feel confident and empowered!

Retiree
Billing Software Feature Checklist

CORRESPONDENCE
√ Automatic or manual letter generation
√ Ability to customize letters in Microsoft Word
√ Automatic storage of printed letters
√ Optional letters including free-form letters
√ Email correspondence to carriers and/or participants
√ Optional modules to print letters overnight
√ Bulk and duplex printing availability
√ Customization includes logos, text editing, data fields, adding bulleted-numbered lists, and more

BILLING
√ Internal time-management for participant payments, enrollment, and termination
√ Flexible billing options – monthly, quarterly, annually and more
√ Select notices, no billing or coupons
√ Set a unique notice for different types of direct bills
√ Manage billing types per participant type

PAYMENTS
√ Accept checks and include check number and other codes
√ Offer auto-ACH draft, one-time e-check or credit card payments
√ Batch payment processing or import payments
√ Handle advanced payments and flexibility in handling deficient payments

DISBURSEMENTS
√ Send disbursements to the employer, carrier, or designated recipient
√ Set disbursement recipient per benefit plan
√ Disburse by check or ACH

FLEXIBILITY AND CUSTOM OPTIONS
√ Import participants and payments through CSV
√ More than 160 payment, benefit, and employer options to tailor the system to your needs
√ Employer and Participant Login options
√ Customize Employer and Participant Screens
√ Online Enrollment and payment options
√ Customize options per Employer
√ User Defined Fields to create your own fields
√ Generate 834 EDI File Transmissions
√ Employer-initiated participant entry and report generation
√ Permission sets to enhance user-security
√ Scan-in documents such as checks and enrollment form

REPORTING
√ Create custom reports or modify existing reports with our Report Builder engine
√ More than 50 predefined reports including filter options for easy on-demand reporting
√ Report export capabilities to Excel, PDF, CSV and more
√ User-audit tracking for all user-types tracking logins, actions, participant history, and option changes
√ Participant reports including Address Change, Payment Reports, Dependent Age, Status Reports, and more
√ Premium Reports: Premium Receipt, Disbursement Reports, Electronic Payments, Balance Reports, and more
√ Multiple Benefit Listing Reports including W-2 Benefit Summary Report
√ Certificate of Mailing Report

Why Travisoft?

Travisoft delivers automation with a personal touch. We offer complete phone and online support, training and implementation assistance.

We want you to understand, use and LOVE your system.

We are committed to delivering:

» **Exceptional experiences**
» **Premium products**
» **Simple pricing**

Request a demo and meet the team at Travisoft. You'll feel the difference.

Travisoft