



Firefly Admin Inc.
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DATE: August 22, 2025

TO: **Town of New Hartford**

RE: Document Disposition Election Form

Firefly Admin Inc. operates as a paper-free office, but we will always accept original paper documents from our clients and participants. In the past, the original paper documents have been retained in our office. For the purposes of this Document Disposition Election Form, original paper documents may include:

- Hand-signed Beneficiary Designation Forms
- Hand-signed Entitlement Forms & Payment Applications
- Hand-signed Change Forms
- Hand-signed Correspondence
- Plan Documentation (e.g., Plan Documents, Point Systems, Board Resolutions)
- Annual Census Listings & Certifications
- Engagement Letters & Service Agreements
- Other Similar Documents

As Firefly receives these types of documents, we scan them in PDF format.

Effective September 1, 2025, the documents scanned by Firefly will comply with the PDF/A standard for long-term archiving. This change is being made based on our understanding of best practices recommended by the New York state Archives. Forms received and scanned prior to September 1, 2025 are not guaranteed to comply with the PDF/A standard.

After Firefly has scanned a document, the PDF/A document is uploaded to our secure web-based file-sharing portal (currently ShareFile). Authorized Town personnel have access to this portal and receive an email alert when documents are added. The authorized Town personnel can download and print these documents as needed.

In the past, Firefly has been retaining the original documents received in our files. **Beginning effective October 1, 2025, we will no longer be permanently retaining original paper documents.** Based on our discussions with the New York State Archives, we believe that it is in our client's best interest to:

- Return original Beneficiary Designation Forms. Since these are "living" documents that could determine benefits payable in the future, we felt it best to return these original documents. You should store or destroy them based on your own internal document retention policy.
- Give you the option to have all non-Beneficiary Designation Forms returned as well, or allow us to securely shred them.

All original documents will be returned once a year with the Annual Report. Shredding is performed monthly by a third-party provider. Documents are stored in a locked bin until shredded.

Accordingly, we request that the Town make a Document Disposition Election as follows:

Document Disposition Election

Please select ONE of the following options for the physical documents we currently hold on your behalf:

☐ Option 1: Secure Shredding of non-Beneficiary Forms

Firefly will securely shred all original documents, **except Beneficiary Designation Forms**, after scanning and uploading them to our secure file-sharing service. Shredding is performed monthly by a third-party provider. Documents are stored in a locked bin until shredded. Once shredded, they cannot be recovered. Accumulated original Beneficiary Designation Forms will be returned with the Annual Report.

☐ Option 2: Document Return

Firefly will return all original documents with the Annual Report.

This Election will remain in effect until the Town submits a new election form. You may change your selection at any time by notifying Firefly in writing.

By signing this Document Disposition Election, you agree to the following statements:

1. I am authorized to make this election on behalf of the Town of New Hartford.
2. I have read and understood the options above and that the selected option reflects the preference of the Town Board of the Town of New Hartford.
3. Firefly is authorized to follow the selected Document Disposition Election beginning October 1, 2025.

Name: _____

Role with Town: _____

Signature: _____

Date Signed: _____