

PLANSOURCE

Nova Release Preview Webinar

February 24, 2021

WILL WE HAVE ACCESS TO TODAY'S
PRESENTATION?

Yes!

We will email you a link to the on-demand recording following today's webinar.



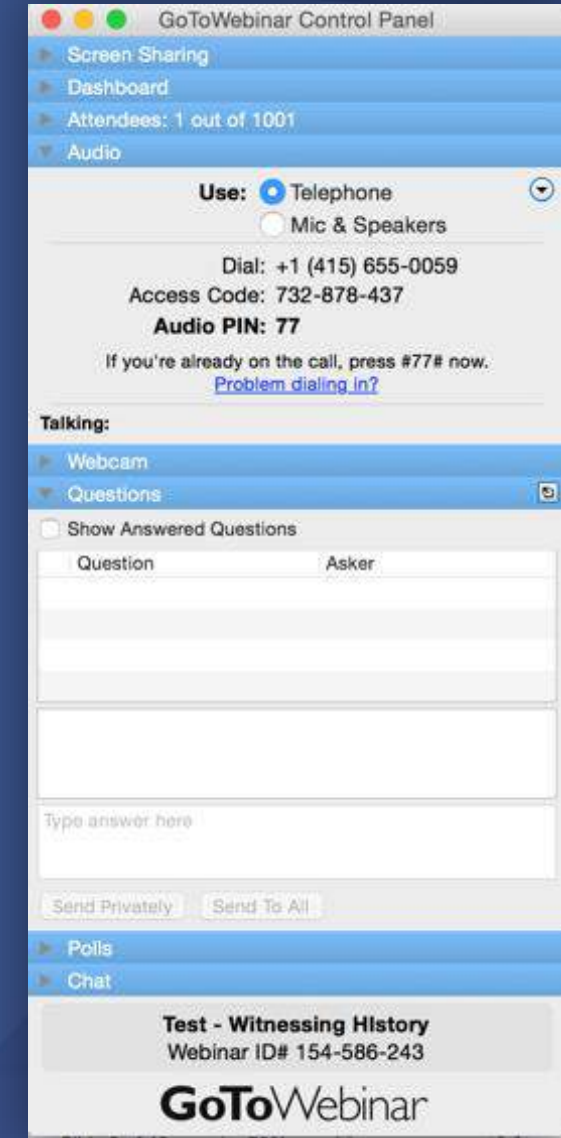
HOW TO ASK A QUESTION

Type your question into the “Questions” panel



QUESTIONS

We will answer these during the live Q&A at the end.



HOW TO SHARE FEEDBACK

Tell us what you thought!



SURVEY

After today's webinar ends, you'll be prompted to complete a short survey. We'd love your candid feedback on how we can make our releases more valuable for you and your teams.

1:02 Survey Skip

Tell Us What You Thought!

1. How valuable was today's preview webinar for you?

1 2 3 4 5

Waste of Time Super Helpful

2. Would you be interested in participating in focus groups to provide feedback to our product teams?

Yes
 Not right now

3. What kinds of release resources would be most helpful to you & your employer groups?

Overview Webpage with High-Level Features & Value
 Detailed Technical Release Notes
 Partner Preview Webinar (like this one)
 Employer-Specific Preview Webinar
 Blog Post or Article About Each Feature
 Short Demo/Explainer Video For Each Feature
 Q&A Session with Product Team
 Email Templates for Communicating to Employer Groups

4. What other feedback or suggestions do you have to help make our product releases more valuable to you?

Today's Speakers



Darren Lucas
Product Manager



Destry Gustin
Product Manager



Cat Miller
Senior Director, Marketing

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QUARTERLY RELEASES

Continuous Investment and Innovation

UPCOMING
RELEASE



Nova
March 11, 2021



Halo
June 10, 2021



Titan
September 9, 2021



Zenith
September 9, 2021

Major releases four times per year with a published release schedule. Learn more at plansource.com/releases.

Transparent release communications, including a web page, training videos, in-system and e-mail notifications

Nova Release Key Themes



Seamless Employee
Experiences



Faster, Easier
Configuration



Empowerment
Through AI/ML

AGENDA

2021 Roadmap Preview

PlanSourceIQ

HR Experience

PlanSource Boost

Marketing Updates

Wrap-Up & QA



2021 Roadmap Preview

2021 Product & Technology Investment Themes

BOOST

Scale our Boost program to add even more carrier partners, industry-leading integrations, and powerful software capabilities

PARTNER INTEGRATION

Connect with additional HCM, HSA, FSA, and 401(k) vendors while scaling our pathway for future integrations to provide a best-in-class solution in an expanding market

NEW PRODUCT MODULES

Deliver new value-add products with the foundation and power of artificial intelligence and machine learning, such as next-generation decision support and automated dependent verification

EFFICIENCY TOOLS

Enhance our onboarding and renewal tools and expand data-driven configuration to serve customers with greater efficiency and transparency while reducing complexity and errors

OPTIMIZE CORE

Put the finishing touches on some of our 2020 initiatives and refine and enhance our core employee and HR experiences, including regulatory updates

TECHNOLOGY & SECURITY

Invest in our technical platform and tools to enable the speed, security, and scalability required to deliver industry-leading benefits technology



BOOST

Boost

- **Boost Integrations:** Continue building a scalable and sustainable foundation to offer more partners, more integrations, and more capabilities.

Modern API Integrations include the following:

- **Plan Configuration API:** Automates the setup and renewal process, eliminating errors and saving time
- **Enrollment Transaction API:** Eliminates traditional batch EDI files, turns a weekly process into real-time
- **Evidence of Insurability API:** Allows employees to complete EOI within the shopping experience
- **Member Portal & Provider Directory:** Employees can easily search for and select dental providers within PlanSource



PARTNER INTEGRATIONS

Partner Integrations

- **HCM Integrations:** Expand our network of direct integrations, so more HCM vendors can seamlessly fit PlanSource into their existing HCM ecosystem to create a unified solution
- **Alegeus HSA/FSA Integration:** Allow employees to view balances for their HSA/FSA accounts and log in using outbound SSO right from PlanSource



NEW PRODUCT MODULES

New Product Modules

- **Automated Dependent Verification:** Leveraging AI and ML technology, to build a solution that recognizes required documents such as marriage certificates and instantly detects and validates key data elements to enable real-time verification at enrollment as well as streamlining post-enrollment audits.
- **Next-Generation Decision Support:** Our vast data sets and powerful AI & Machine Learning models will deliver simple “People Like Me” suggestions and provide employees with data-driven insights at their fingertips right within the shopping experience, helping make plan selection easy.
- **Outbound SSO:** Make PlanSource a central hub where employees can access all their benefits – including provider directories, insurance portals and more – with one login and one set of credentials



EFFICIENCY TOOLS

Efficiency Tools

- **Guided Renewal & Guided Launch:** Improve customer experiences and shorten timelines by creating a unified renewal and implementation engine that automates as much manual work as possible and gives clients greater visibility and control. With our simple guided workflow, clients will be empowered to move through independently, reducing the confusion, errors, costs, and time-consuming back-and-forth that create additional work for everyone today.



OPTIMIZE CORE

Optimize Core

- **ACA Enhancements:** Meet the changing regulatory requirements for calculating and reporting data so our clients can easily stay compliant with federal ACA and individual state mandates
- **HSA Continued Enhancements:** Continue improving our HSA functionality by giving employees and employers the flexibility to make one-time or scheduled contributions
- **Mobile App Enhancements:** Put even more convenience at employees' fingertips with our app, encouraging them to enroll on their mobile devices and continue accessing their benefits all year long
- **New HR Experience:** Bring the remaining classic Ben Admin pages into our New HR Experience, while maintaining the power user capabilities admins enjoyed from the Classic view
- **Multi-Factor Authentication (MFA) - Email:** Help enhance security with improved MFA options, including white labeling, Bring Your Own Authentication (BYOA), and verification via phone

PlanSourceIQ

Empowerment Through AI/ML



ANNOUNCING NEW PRODUCT LAUNCH:
PlanSourceIQ Suite

DecisionIQ



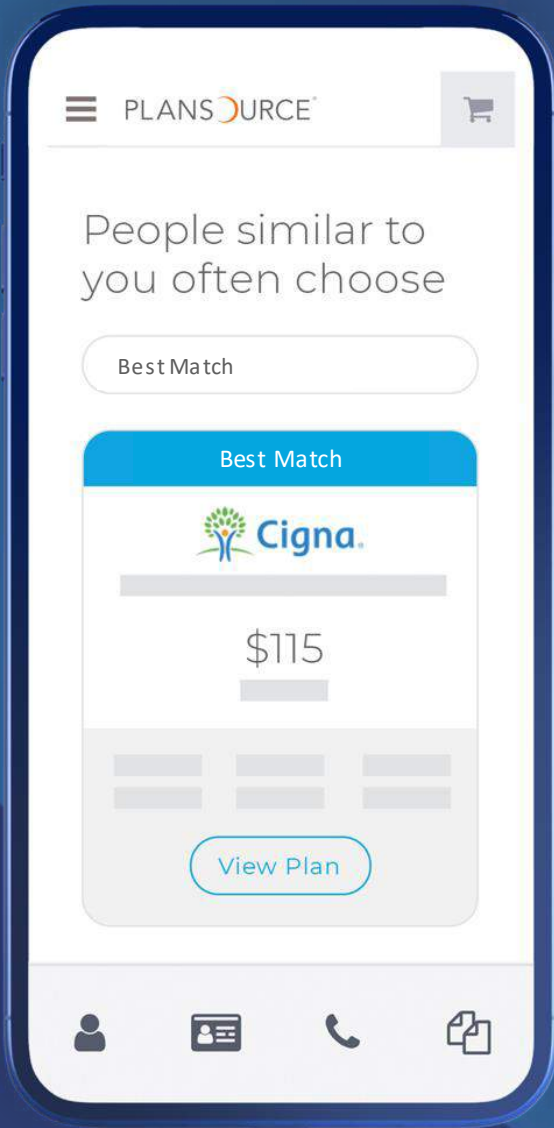
DependentIQ

Powered by a sophisticated AI/ML engine

Part of our new PlanSourceIQ suite of add-ons

Available in Q2/Q3 to Early Adopters

Available now for pre-purchase



NEW PRODUCT LAUNCH: PLANSOURCEIQ

DecisionIQ Add-On Product

OUR PRESCRIPTIVE, AI-BASED DECISIONS ENGINE

AI/ML Intelligence

AI/ML technology surfaces personalized insights in the shopping experience

Health and Voluntary Plans

DecisionIQ covers all products and plans, not just part of your benefits package

Personalized Suggestions

Employees can answer a few questions to incorporate personal preference

Coverage and Contributions

Help employees understand the right coverage HSA/FSA contribution amounts

Localized Cost Comparisons

Get hyper-targeted cost estimates based on regional cost data

On-Demand Advice

Available 24/7 for instant guidance via phone, laptop or our mobile app

DECISIONIQ ADD-ON PRODUCT

Estimated 6x Return on Investment



SAVE TIME

Real-time benefits guidance right within the shopping experience means fewer questions for your HR team and more time back in your day



IMPROVE EXPERIENCE

By empowering better decisions, employees are more likely to appreciate their benefits package and get more value out of it



REDUCE COSTS

Lower plan and premium costs when employees enroll in the best plans and coverage levels for their needs



INCREASE PARTICIPATION

Drive awareness and adoption of plans and coverage that employees might not normally enroll in – like HDHPs and new wellness programs

DEPENDENTIQ ADD-ON MODULE

Instantly verify dependents with AI-powered eligibility verification in PlanSource



MINIMIZE COSTS & RISK

Our system will instantly and preemptively verify dependents at the time of enrollment, eliminating the burden of post-enrollment audits, lowering costs and improving compliance.



SMART AI/ML AUTOMATION

Powered by AI and ML technology, DependentIQ recognizes required documents and instantly detects and validates key data elements to enable real-time verification at enrollment.



REAL-TIME RULE ENFORCEMENT

If ineligible dependents are never allowed to enroll in the first place, they don't have to be removed later, saving time and eliminating the need to have uncomfortable conversations with employees.

A BETTER WAY TO VERIFY DEPENDENTS

AI/ML technology provides an opportunity to streamline an inefficient and costly process

EXISTING SOLUTIONS

1. Configure and set up document request rules manually
2. Employees submit documents
3. HR manually looks up employee profile and cross-checks with document
4. HR approves or denies document
5. HR manually removes ineligible dependents from plans

DEPENDENTIQ

1. Auto-configure document request rules
2. Employees submit documents
3. Image recognition and auto-detection eliminates 70%+ of manual document cross-check review
4. Optimized workflow queue allows easy and quick task management
5. HR leaders use dashboard to monitor status, KPIs and ROI

DependentIQ Example

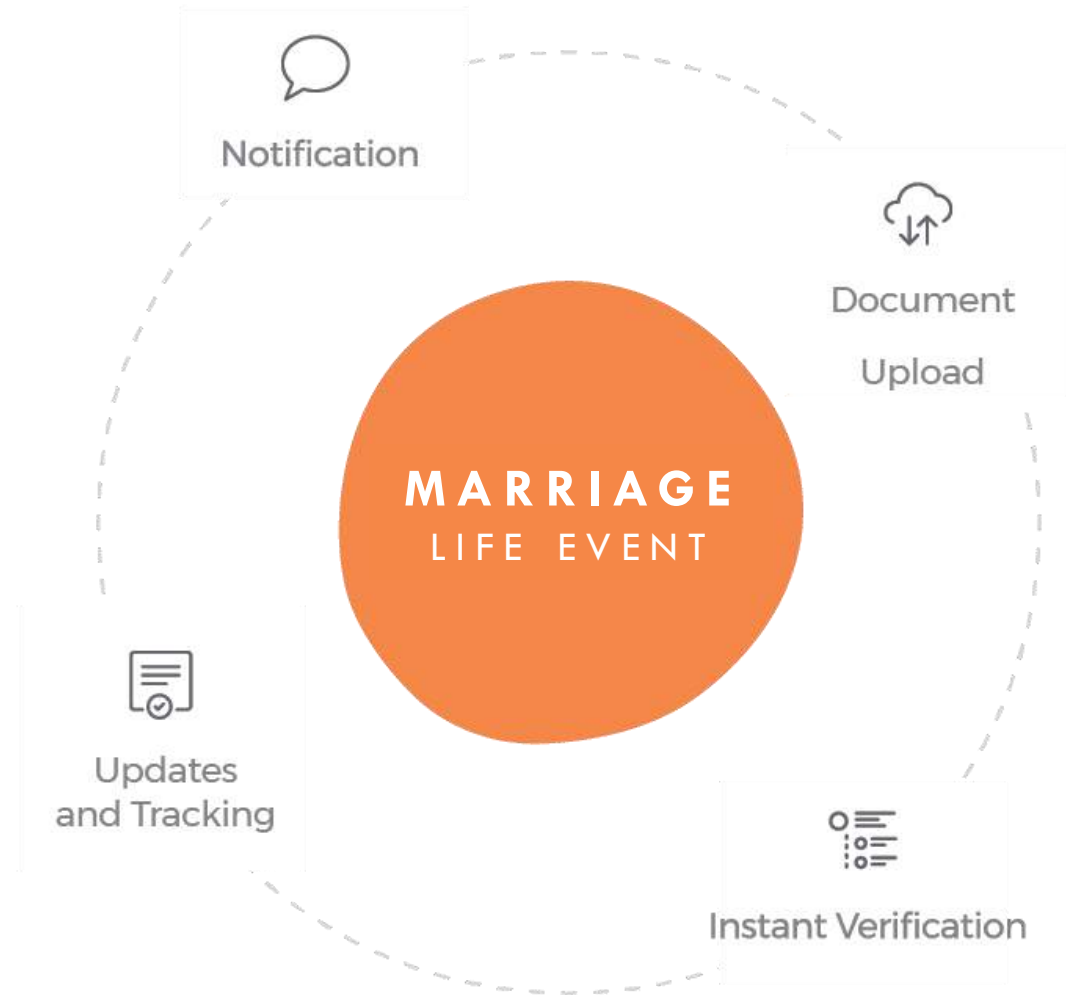
How DependentIQ works for a marriage life event

#1 NOTIFICATION

After creating a new marriage life event, the system notifies the employee she needs to upload a marriage certificate.

#4 UPDATES/TRACKING

The employee is notified immediately that the marriage certificate is approved. HR can review any exceptions or docs that weren't auto-approved.



#2 DOCUMENT UPLOAD

When it's convenient, she can upload the certificate by snapping a photo from her phone and adding it to PlanSource.

#3 AUTO-VERIFICATION

Our powerful DependentIQ AI/ML technology automatically scans the document and instantly approves the document, which verifies the dependent.

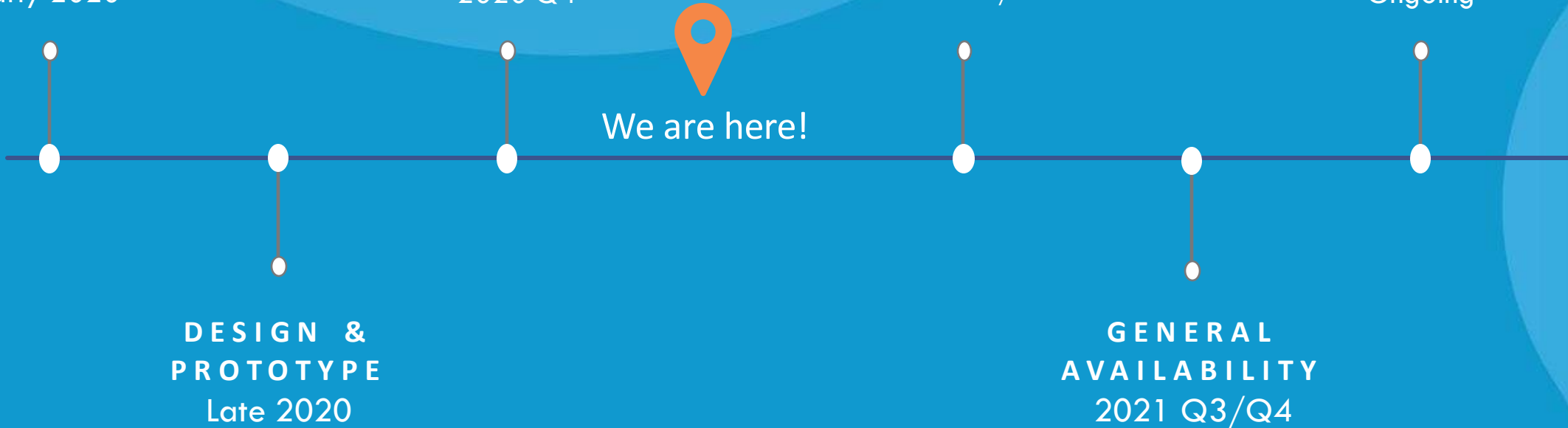
PlanSourceIQ Evolution

**RESEARCH &
VALIDATION**
Early 2020

**DEVELOPMENT
KICKOFF**
2020 Q4

**EARLY
ADOPTERS**
2021 Q2/Q3

**ONGOING
ENHANCEMENTS**
Ongoing



HR Experience

Faster, Easier Configuration



Required Fields

Content marked * is required for decision support.

Deductibles	In-Network	Out-of-Network	Preferred-Network
Individual	\$1000 *	\$2500	
Family	\$3,000 *	\$10,000	
Annual Out of Pocket Maximum			
Individual	\$3,000 *	\$5,000	
Family	\$5,000 *	\$10,000	
Co-Pays			
Primary Office Visit	\$30 *	\$150	
Specialist Office Visit	\$50 *	\$150	
Urgent Care Copay (In-Network)	\$50 *		
ER Copay (In-network)	\$300 *		
Co-Insurance (%)	80% *	90%	
Maximum Lifetime Benefit	\$100,000 *		
Pharmacy			
Rx Copay - Generic	\$150 *		
Rx Copay - Brand	\$150 *		
RX Copay - Non-Formulary	\$150 *		

GUIDED RENEWAL/LAUNCH SELF-SERVICE FOR PLAN CONTENT DETAILS

Faster, smoother implementation and renewal with less need for support

HR admins can now enter all plan content details without having to put in a support ticket and wait for assistance

The clear and efficient workflow walks admins through how to enter the data

Having all plan content details entered allows employees to take advantage of our compare and decision support capabilities

Available to: Everyone in Guided Renewal & Guided Launch

How to use: Use Guided Renewal / Guided Launch for your clients and make sure all plan content details are entered

ACA COMPLIANCE

2020 State ACA Reporting Reminders

Cheers to another successful ACA season!

Certain employers are now required to report to California, New Jersey, Rhode Island, and Washington, D.C. PlanSource supports all four of these states.

If you're affected and want us to handle your state reporting, opt into our State Compliance Reporting Service by approving your state forms in ACA State Transmissions by March 24th.

Going forward, you'll remain opted in and be billed monthly starting in May. Those who don't opt in will no longer have access to the ACA State Transmissions page.

You must be a current Federal ACA client to use the service. Visit plansource.com/state-compliance to learn more and consult your tax advisor to understand your organization's reporting requirements.

If you don't have Federal ACA, sign up by November at plansource.com/ACA to use it for 2021!

PlanSource Boost

Seamless Employee Experiences 

MODERN API INTEGRATIONS

That provide a real-time customer experience



PLAN CONFIGURATION

Automates the setup and renewal process, eliminating errors and saving time



ENROLLMENT TRANSACTIONS

Eliminates traditional batch EDI files, turns a weekly process into real-time



EVIDENCE OF INSURABILITY

Allows employees to complete EOI within the shopping experience



MEMBER PORTAL & PROVIDER DIRECTORY






Employees can easily search for and select dental providers within PlanSource

AVAILABLE API INTEGRATIONS WITH CARRIERS

We'll be releasing several more throughout 2021



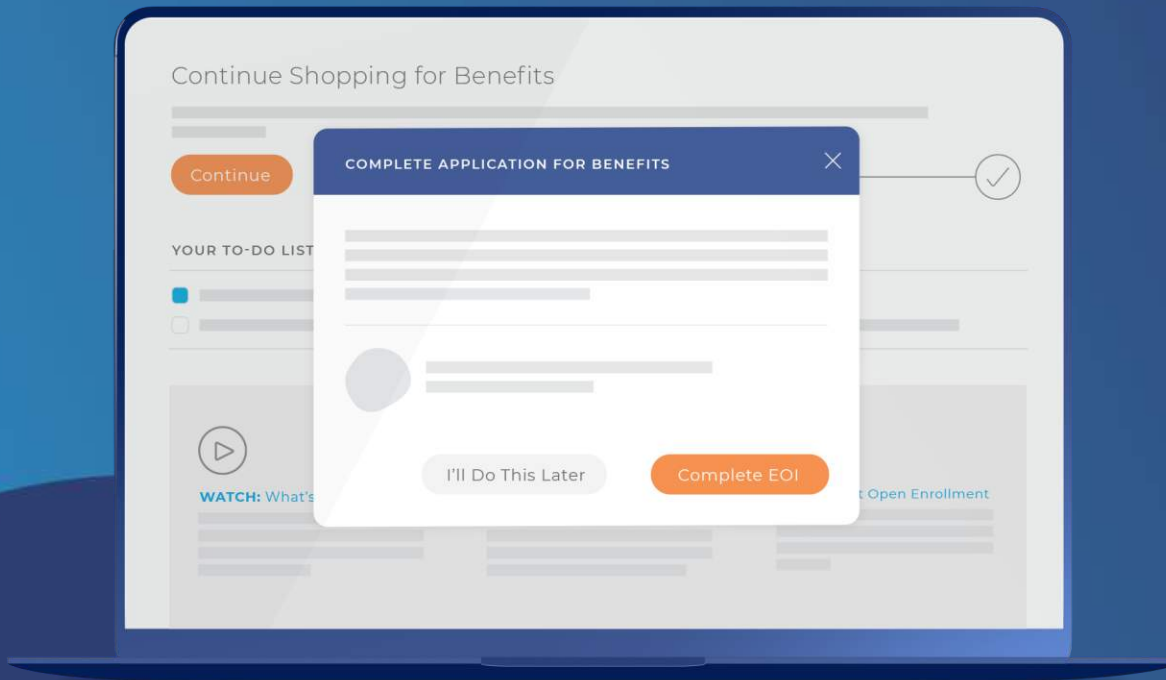
Current EOI Integrations Available Today

	PHASE 1 Integrated Shopping Experience	PHASE 2 Automated Decision Notification
	Available for Early Adopters	<i>Future Release</i>
	Available Now	Available Now
	Available Now*	Available Now
	Available Now (Early Adopters)	<i>Future Release</i>
	Available for Early Adopters (1,000+ Employees)	<i>Future Release</i>
	Available Now (100+ Employees)	Available Now (100+ Employees)
	Available Now	Available Now
	Available Now	<i>Future Release</i>
	Available Now	<i>Future Release</i>

* Some state limitations apply

AFLAC EOI SINGLE SIGN ON

Fast, seamless EOI enrollment now available for Aflac



Simplifying the employee experience by easily accessing the Evidence of Insurability form right in the benefits shopping experience, no separate login needed

After employees complete the EOI form, it is automatically sent to Aflac

Supports Basic Life & Voluntary Life

Available Now for Early Adopters
For Early Adopter inquiries, contact
Ryan.Jepson@plansource.com

METLIFE MEMBER PORTAL SINGLE SIGN-ON

Giving employees just one place to go to enroll, manage, and use their benefits

Right from the dashboard, employees can click "**View Your MetLife Account**" to be logged into the MyBenefits Portal automatically.

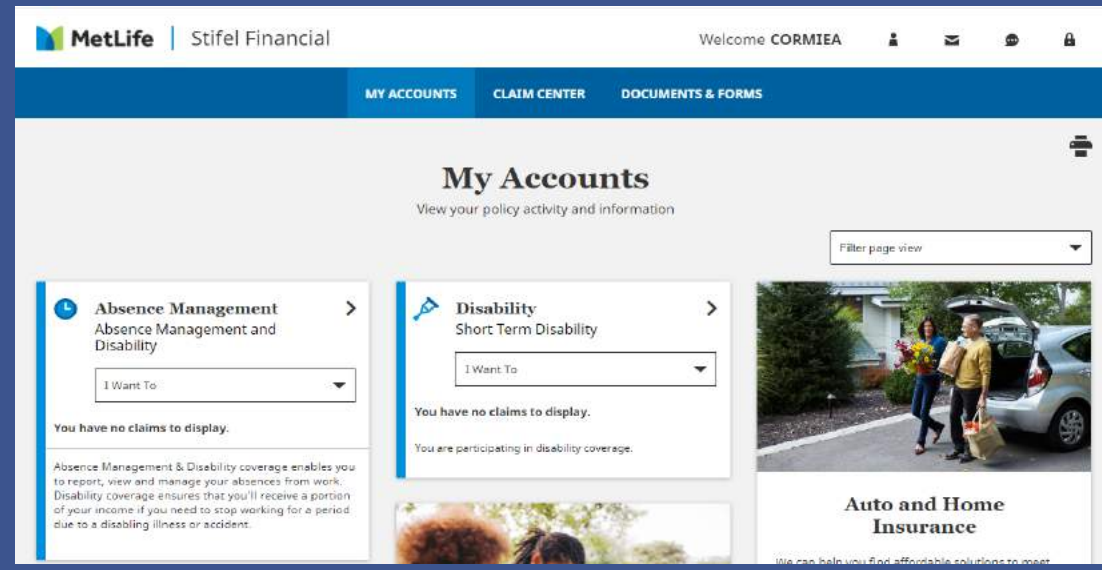
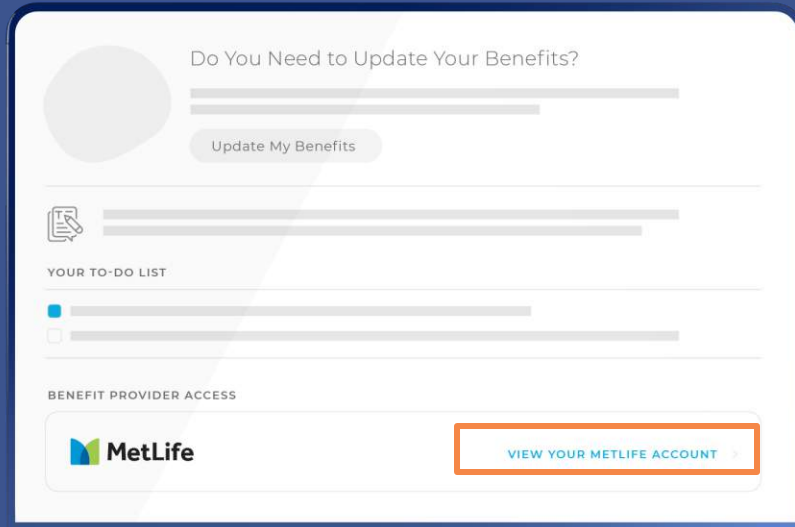
With fewer URLs and credentials to remember, employees will experience:

Seamless experience and convenience using the benefits shopping experience

Greater engagement and usage of both PlanSource and MetLife

Available to: MetLife Early Adopters

How to use: For Early Adopter inquiries, email Ryan.Jepson@plansource.com



MetLife Member Portal

Product Demo



PLANSOURCE[®]

Intuitive benefits shopping, enrollment, billing and administration in the cloud

Login

Username

Password

Submitting...

[Forgot your password?](#)

Marketing Updates

Release Communications: External

External Promotions and Resources



Release
Webpage

[Releases.plansource.com](https://releases.plansource.com)



Preview
Webinar



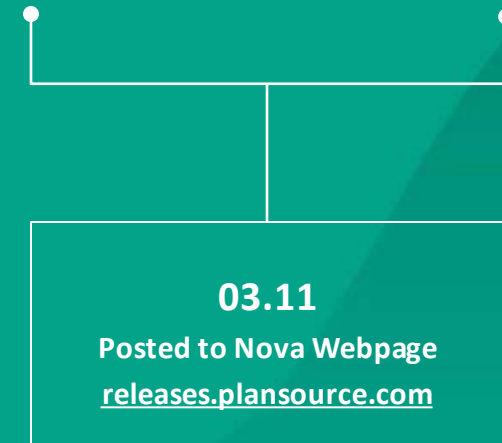
Nova Release Go-
Live



Release Notes



Updated PSU
Courses



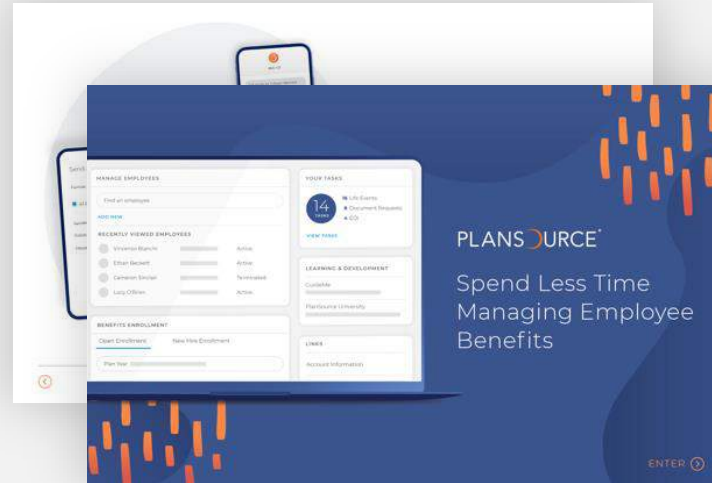
New PlanSource Portfolio Launched

PlanSource digital marketing resources



plansource.com/collateral
plansource.com/decisioniq
plansource.com/dependentiq

– NEW –



plansource.com/portfolio

– NEW –



boost.plansource.com

OTHER RESOURCES

Educational Videos: plansource.com/videolibrary • Demo Videos: plansource.com/demovideos

Q&A & WRAP-UP

Ask your questions now.

Thanks for attending!