

PLANSOURCE

Halo Webinar

MAY 27, 2021



Darren Lucas
Senior Product Manager



Ryan Jepson
Senior Product Manager



Bryce Deneen
Dir. of Product Management



Cat Miller
Senior Director of Marketing

AGENDA

- DependentIQ
- Guided Renewal and Launch
- New Login Experience
- PlanSource Boost
- COBRA & ARPA
- UKG HCM Enhancements
- PlanSource Ideas Portal
- Marketing Updates

HALO RELEASE THEMES



Reduce Costs with AI



HR Efficiency & Compliance



PlanSource Boost



HCM Enhancements

QUARTERLY RELEASES

Continuous Investment and Innovation

UPCOMING
RELEASE



Halo
June 10, 2021



Titan
September 9, 2021



Zenith
December 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

DependentIQ

Reduce Costs with AI

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

DEPENDENTIQ

1. Auto-configured document request rules
2. Employees submit documents
3. Image recognition and auto-detection eliminates 85%+ of manual document review for supported documents
4. Optimized workflow queue allows easy and quick task management

DependentIQ Example

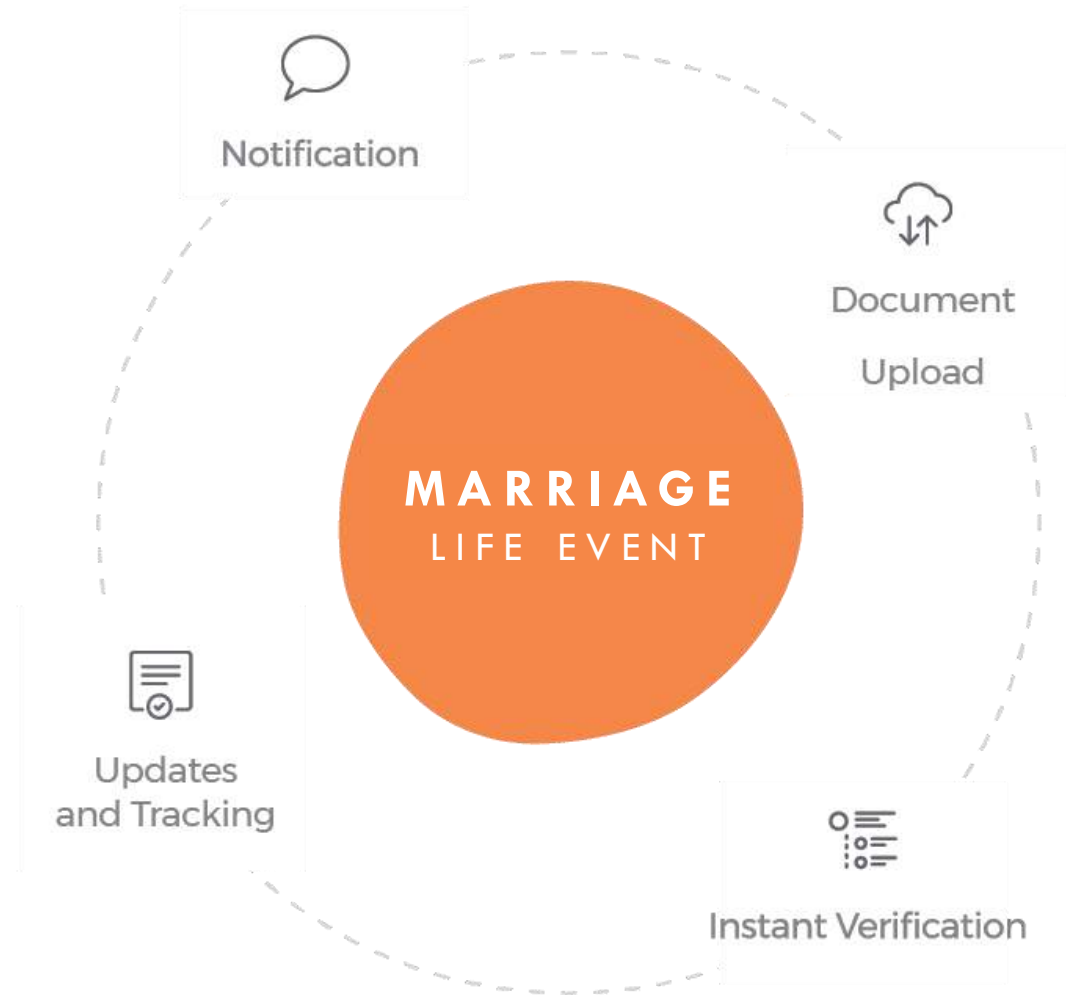
How DependentIQ works for a marriage life event

#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.

Demo

Now accepting Early Adopters
Implementations to begin on July 1st

Guided Launch & Renewal

HR Efficiency

Test Employee Eligibility + Add a New Employee

Find an Employee

John |

Search Results ≡

<input type="checkbox"/> Employee Name	Employee Number	Subscriber ID	Population	Coverage Level	Status
<input type="checkbox"/> John Allgood	1234556	10293847	Full Time	Employee Only	Active
<input type="checkbox"/> John Banner	0987645	29384756	Full Time	Employee + Spouse	Active
<input checked="" type="checkbox"/> John Candy	1029387	09876543	Full Time	Employee Only	Active
<input checked="" type="checkbox"/> John Doerhety	0987645	29384756	Full Time	Employee + Spouse	Active
<input type="checkbox"/> John Goodman	0987645	29384756	Full Time	Employee + Spouse	Active

Create Test User, Copy Coverages Rows per page: 10 1-5 of 5 < >

Create Test User, No Coverages

Test Employee List

A list of test employees that have been created for your organization Q ≡

<input type="checkbox"/> Employee Name	Employee Number	Subscriber ID	Population	Coverage Level	NPY Coverages	Test Status
<input type="checkbox"/> Mary Swanson (Test)	0987645	29384756	Full Time	Employee Only	Copied	Tested
<input type="checkbox"/> Lyod Dunn (Test)	0987645	29384756	Full Time	Employee Only	Copied	Tested

Rows per page: 10 1-2 of 2 < >

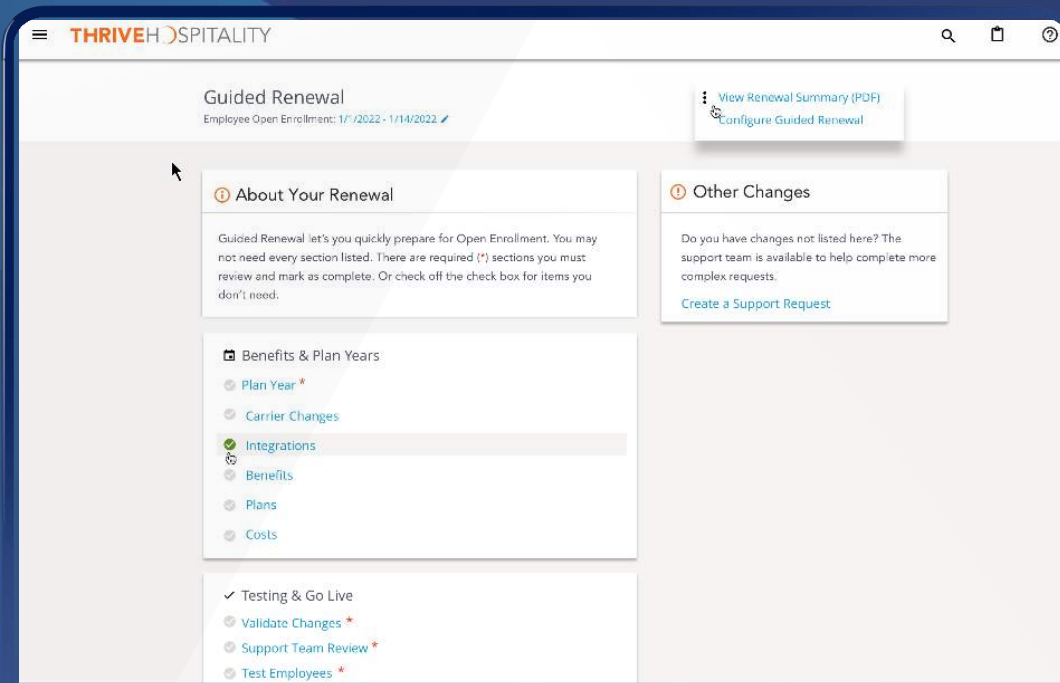
Q2 – Halo

GUIDED TESTING

- A large portion of renewal hours are spent on testing
- Allows users to create new test employees, copy coverages, and test employees directly
- Allows users to mark off employees as tested
- Designed to be a one-stop testing solution

Q2 – Halo

GUIDED RENEWAL DASHBOARD



- Removes the What's Changing Survey to reduce friction and number of restarts
- Aligns with Guided Launch dashboard for a cohesive experience
- Boosts scalability for future additions
- Removes certain logic so HR leaders can test at any point in the renewal process rather than only at the end

Guided Launch

13 / 23 STEPS COMPLETE

This dashboard will allow you to access and see the status of each step required to implement your company.

Company Information

- ✓ Contacts
- ✓ Company Branding
- ✓ Payroll Calendar

Rules & Eligibility

- ✓ Employee Classifications
- ✓ Eligibility & Populations
- ✓ New Hire Rules
- ✓ Life Events Rules
- ✓ Dependent Relationships
- ✓ Document Management
- ✓ Work Status Events

Benefits & Plan Years

- ✓ Plan Year
- ✓ Integrations
 - Benefits
 - Plans
 - Costs
 - Validate Benefits

Q2 – Halo

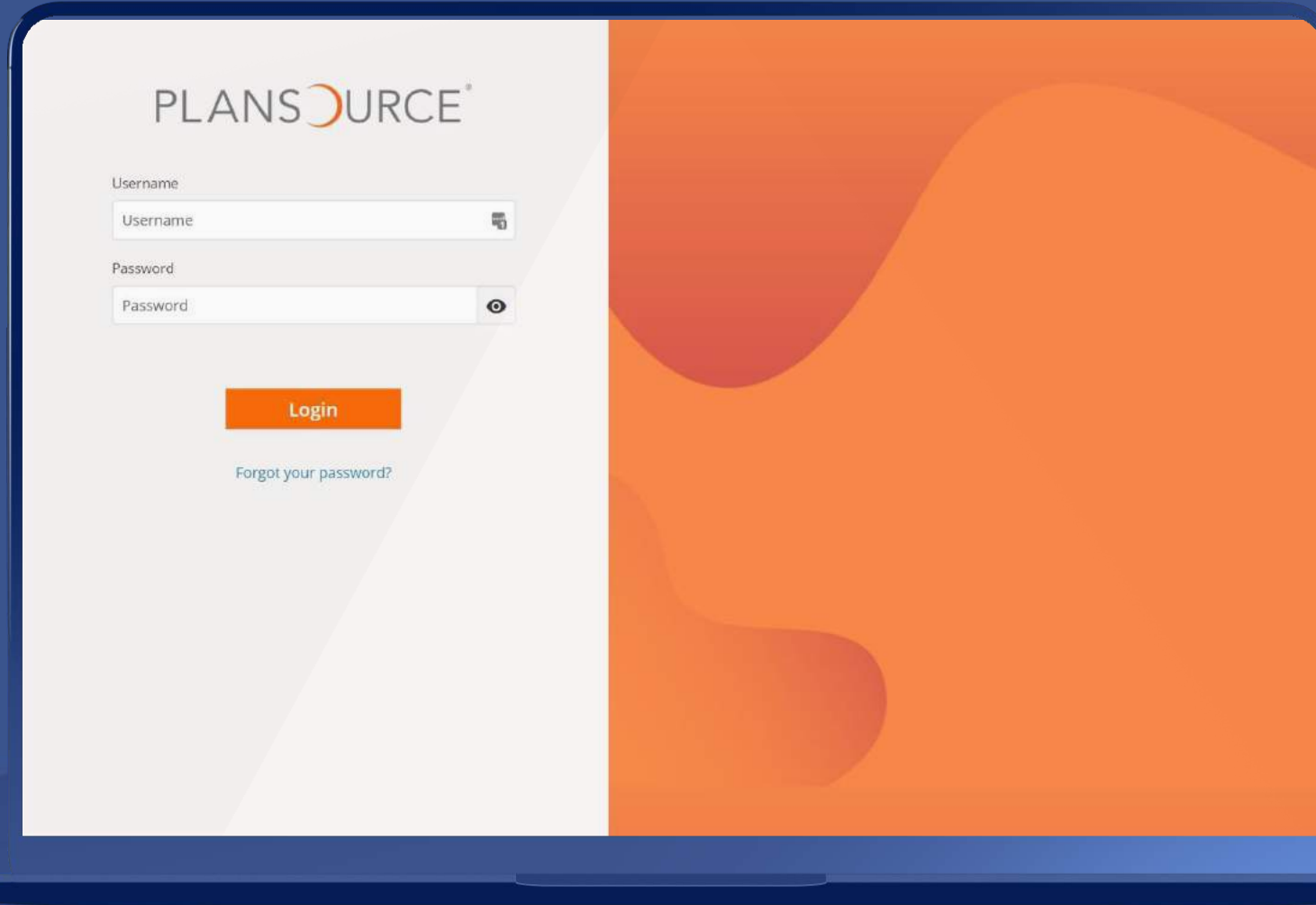
GUIDED LAUNCH DASHBOARD

- Rebrands Enhanced Implementation to Guided Launch
- Brings all elements of the implementation wizard into a cohesive, unified visual framework – productizing Guided Launch
- Brings additional elements of Guided Renewal into Guided Launch, such as testing

New Login Experience

Modern interface, clean design & custom branding

REDESIGNED LOGIN PAGE



Clean & modern interface | Secure and mobile-responsive, applies to all pages within login experience


Company Branding

Use this page to customize the employee experience and help reflect your company brand.


All Complete **Save and Return Later**


Company Branding

Company Logo
Logos will be scaled to a maximum 280px wide or 70px tall.



Brand Colors
Brand colors will be reflected inside the Employee Experience.

 **Primary Brand Color**
This color appears in primary buttons such as the Add to Cart or Save. Do not use grey or black. [Reset](#)

 **Secondary Brand Color**
This color appears in accents and links. [Reset](#)

Apply Colors to Admin Experience

Custom Login Screen

A custom login screen allows employees see your company branding. Your custom URL will be preceded by "https://benefits.plansource.com/#". Please note the URL must contain the "#" for security reasons.

Enable a Custom Login URL

Custom URL

https://benefits.plansource.com/# ✔ This URL is available.

Background Image
Upload an optional background image, a minimum of 800px by 800px, and that will be scaled to fit the login page.

✘

Company Branding Self-Service

Available in Guided Renewal, Guided Launch and on the HR admin dashboard mid-year

Allows HR leaders to upload their own logo and brand colors, ability to update at renewal if branding changes

If using custom logins, employer can choose custom URL and background image



Login

Username

Password

[Forgot your Password?](#)



Custom Login Pages

CHOOSE A CUSTOM URL:

benefits.plansource.com/?yourcompany

- Apply enrollment branding colors to your custom login page
- Show your logo
- Apply a custom background image

Our Early Adopter program for this feature is currently full, but stay tuned for updates on general availability this September!

Demo



Discontinuing Support of IE11

PlanSource will discontinue support of Internet Explorer 11

Users may still use IE11 but we will not support any bugs that exist, and new features will not be compatible with IE11

IE11 will be discontinued completely in the future

PlanSource Boost

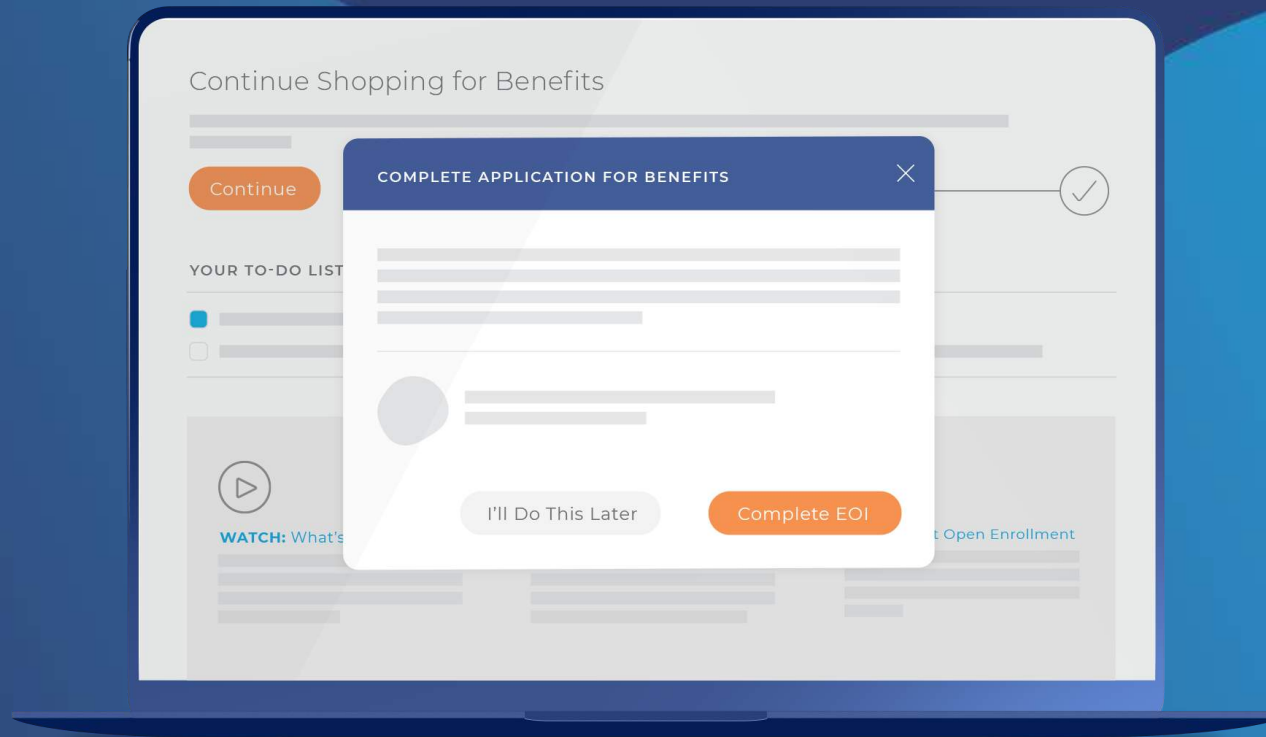
Seamless Employee Experience

Sun Life EOI Integration

Evidence of Insurability Single Sign On allows employees to easily fill out EOI forms within the benefits shopping experience

Decision Notification reduces admin workload in approvals and provides status update to employee and HR team automatically

Available to early adopters in June!



Current EOI Integrations Available Today

	PHASE 1 Integrated Shopping Experience	PHASE 2 Automated Decision Notification
Guardian	Available Now*	Available Now
The Hartford	Available Now (EARLY ADOPTERS)	Future Release
Lincoln	Available for Early Adopters	Future Release
MetLife	Available Now	Available Now
New York Life	Available Now	Available Now
Prudential	Available Now	Available Now
Sun Life	Coming in June Release	Coming in June Release
Unum	Available Now	Future Release
Voya	Available Now	Future Release

COBRA & ARPA Update

ARPA COBRA Subsidy

Applicable Period

APRIL 1, 2021 – SEPTEMBER 30, 2021

- Available only to those “assistance eligible individuals” whose initial COBRA coverage period starts either before or during this six-month period and ends (or would have ended if COBRA had been elected/did not lapse) either during or after this six-month period.
- The ARPA COBRA subsidy does not lengthen the COBRA period.
- Those potentially eligible for the subsidy will be those employees who were first eligible for COBRA coverage in October 2019 or later.
- If a former employee’s 18-month COBRA period begins after April 1, 2021 or ends before September 30, 2021, the ARPA subsidy will be shorter than six months.

ARPA COBRA SUBSIDY

What employers were required to do



IDENTIFY ELIGIBLE INDIVIDUALS

Employers need to identify assistance eligible individuals and provide notice about the new benefit and special enrollment period



ACT QUICKLY

Required ARPA COBRA Subsidy Notices must be mailed within 60 days of April 1, 2021 (i.e., by May 31, 2021) DOL Model Notices



MAIL NOTICES

Employers are required to mail notices to “assistance eligible individuals” who are still in COBRA eligibility period alerting them of the availability of the subsidy



SEND SUBSEQUENT NOTICES

Employers are required to send subsequent notices informing individuals that the subsidy period will be ending within 15-45 days before the end of the subsidy period



INDIVIDUALS MUST NOTIFY EMPLOYER

Individuals must notify employers if they become eligible for other employer-provided group health coverage or Medicare

What has PlanSource done what have our customers needed to do?

PLANSOURCE

EMPLOYER

PLANSOURCE

ELIGIBLE
INDIVIDUALS

PARTICIPANT LOOKBACK REPORT

for customers to see which individuals have experience a qualifying event that could make them eligible for this new COBRA subsidy

Report available now!

NOTE ELIGIBLE INDIVIDUALS

COBRA customers will be responsible for noting in the participant lookback report which individuals have experienced a qualifying event that could make them eligible for this new COBRA subsidy

This was due 5/7 – if you have not completed yet, please contact us ASAP

PLANSOURCE WILL SEND NOTICES

PlanSource will send notice to individuals designated as 'eligible' by their current/former employer

No later than May 31

RETURN PROPERLY COMPLETED FORMS

Eligible individuals will need to attest to their eligibility in the program and return properly completed forms to confirm participation as soon as possible and PlanSource will process for specified COBRA enrollments.

PlanSource COBRA Automation & Staffing Enhancements

Supporting our customers with ARPA legislation

Enhanced COBRA integration to decrease processing time and automate most manual processing

Doubled PlanSource team to handle COBRA processing and mailing on COBRA team and call center

Proactively communicating to customers and partners to ensure they are aware of ARPA legislation and staying compliant

PlanSource is working diligently with COBRA customers to ensure compliance with ARPA legislation

ARPA Resources Available to Partners and Customers



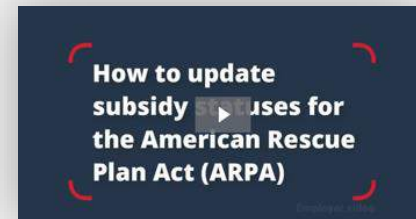
BLOG
[Overview of ARPA / Key Dates](#)
Published 3/19
Updated 4/5



WEBINAR
[What HR Leaders Need to Know](#)
Published 3/19



BLOG
[Top 10 FAQs about ARPA](#)
Published 4/22



INSTRUCTIONAL VIDEO FOR CUSTOMERS
[Updating the Participation Lookback Report](#)

UKG Integration Updates


HCM Enhancements

API Configuration | Deduction Method

PlanSource Connect UKG Pro

UKG

Country Code(s) to Sync:

Sync Terminations/LOA as of Date: 

Employee IDs to Sync Without Filtering:

[Re-Import Subscribers](#)

[Cancel](#) [Test API](#) [Save](#) [Update](#)

UKG Pro — Sync What Matters

- Simpler GDPR compliance
- Reduced noise in the system
- Flexible configuration
 - Termination Date
 - Country Code
 - Overridable by Employee
- We need your feedback -> Do you need this feature for other HCM Providers?

OTHER UKG PRO ENHANCEMENTS



HSA EMPLOYER LUMP SUM CONTRIBUTION

PlanSource can now sync HSA Employer lump sum contributions from the benefits administration platform to UKG Pro



PAYROLL RECORD PARTIAL BATCHING

Employers will see all valid payroll records in UKG right away instead of having to fix issues. This will keep systems in sync and allow for greater flexibility when fixing errors



SUPPORT FOR NEW UKG PRO EVENTS

As UKG continues to add new events to their platform, PlanSource will continue to subscribe to them. These events ensure the platforms remain in sync in real time (ex: SSO Key Updated)

We Want To Hear From You!

The PlanSource Ideas Portal

THE IDEA PORTAL

We want your feedback!



SUBMIT IDEAS &
ENHANCEMENTS



VOTE ON THE
IMPORTANT
ONES



INTERACT WITH
THE PRODUCT
TEAM



IMPACT THE PRODUCT
ROADMAP & VISION

Demo

Marketing Updates

RELEASE COMMUNICATIONS

Learn More About the Halo Release



RELEASE WEBPAGE

plansource.com/release



RELEASE NOTES

COMING SOON
Posted to Halo Webpage
releases.plansource.com



HALO RELEASE GO-LIVE

June 10



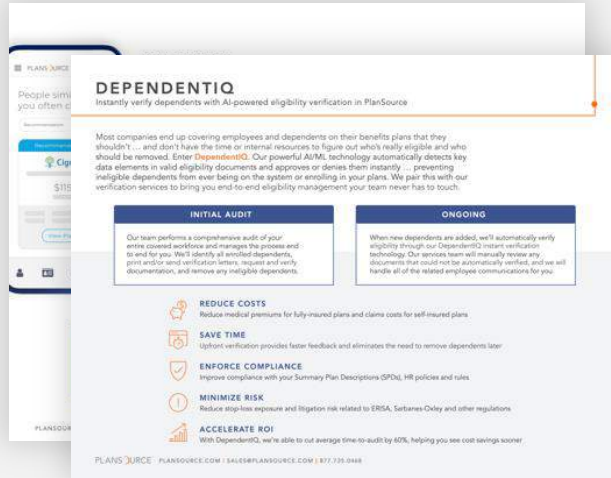
UPDATED PSU COURSES

Available in PlanSource University:

- Guided Renewal for HR Administrators*
- Guided Launch*
- Benefits Administration Introduction*
- Find and Manage Employees*
- Administrator Enroll for Employee Benefits*
- Employee History*
- New HR Experience Introduction*
- Modifying an Employee Status*
- Company Branding (Lesson)*
- Employee Enrollment Types (Lesson)*
- Employee Login (Lesson)*

New Website and Demo Videos Launched

PlanSource digital marketing resources



plansource.com/collateral
plansource.com/decisioniq
plansource.com/dependentiq
- NEW -



plansource.com/portfolio
- NEW -



boost.plansource.com

OTHER RESOURCES

New RFP Template: plansource.com/rfptemplate
New Demo Video Library: plansource.com/demovideos
Educational Videos: plansource.com/videolibrary

UPCOMING WEBINAR



BENEFITS OF AUTOMATED DEPENDENT VERIFICATION

Wed. June 3 | 1 pm ET

plansource.com/webinars

Q&A & WRAP-UP

Ask your questions now.

Thanks for attending!