



Software + Services = A Better Benefits Experience

At PlanSource, we believe that the best way to build a better benefits experience is by combining best-in-class software with a range of high-touch benefit services. This simple equation provides brokers and employers with a complete solution that can help busy HR departments work more efficiently and focus on strategic initiatives rather than tedious tactics.

Premium Benefits Outsourcing

With Premium Benefits Outsourcing, PlanSource is an extension of your HR team. We administer all aspects of your benefits program - from new hire and life event processing to integrations with your insurance carriers and payroll systems. Our benefits outsourcing service includes employee contact center, billing reconciliation and payment and COBRA administration. You can also add on a range of other services so that you can focus on more strategic items in your to-do list.

Why Benefits OutSourcing?

Focus on Your Business

Trust the well-being of your employees to an established partner that is focused on managing employee benefits.

Offer Great Service

Our benefits experts answer employee questions, provide phone-based enrollment and advocate for your employees throughout the year.

Control Risk

Assist with complying with government regulations as well as your own internal policies and procedures.

What Services are Included with Premium Benefits Outsourcing?



System Configuration and Maintenance



New Hire, Life Event and EOI Processing



Data Exchange Operations, Auditing and Reconciliation



Eligibility Management and Urgent Coverage Resolution



Billing Reconciliation and Payment Services



COBRA Administration



Branded Employee Contact Center

Add-On Services



Communications and Fulfillment



Retiree Billing



Leave of Absence Billing



Dependent Verification



FSA/HSA/HRA Administration



QMCSO Processing

Examples of custom communication campaigns tailored for your workforce:

- Benefit Websites
- Text Messaging
- Communication Plans
- Benefit Guides (Print or Digital)
- Total Compensation Statements
- Traditional Printed Materials
- Custom Videos
- Personalized Postcards
- New Hire Packets

You make the decisions, and we manage all the details.

Daily Tasks

- System configuration and maintenance
- Urgent eligibility processing
- New hire and life event processing
- COBRA enrollment and administration
- Contact center support for employees
- HSA/FSA/HRA administration
- Document verification for newly added dependents

Weekly Processing

- Data exchange oversight
- Evidence of Insurability processing
- Payroll import of demographic changes
- Payroll import of hours for ACA measurement
- Payroll deductions export
- Enrollment transactions to insurance carriers
- Resolution of data exchange discrepancies
- New hire and status change communications

Monthly Reporting

- Invoice reconciliation and payment
- Self-bill creation
- Consolidated billing and financial reporting
- COBRA premium remittance
- COBRA auditing and reporting
- FSA auditing and reporting
- Direct billing of retirees and employees on LOA

Quarterly Activities

- Full carrier enrollment audits
- Full HR and payroll system audits
- Business reviews with your HR leaders
- Employee engagement campaigns

Annual Enrollment

- System setup and configuration changes
- Employee confirmation statements
- Optional employee corrections period
- Post-OE data exchange and audit with carriers
- Post-OE payroll updates and audit
- Total Compensation Statements
- Employee reminders and communications

Annual Compliance Activities

- ACA measurement and stability period oversight
- 1094-C creation and transmittal
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- 1095-C fulfillment
- Calendar of employee notifications

Legend: ● Always Included ○ Add-On Services