



PLANSOURCE®

A Great Benefits  
Engagement  
Solution to Stay  
a Cut Above

# Maximize the Benefits of Your Benefits

Free up your HR team to focus on the bigger picture

25%

Total HR team time savings due to automation

3 weeks

HR time saved during open enrollment

Help employees make smarter, more confident benefits decisions

2 hours

Time saved per new hire just with educational videos alone

+11%

Increase in HDHP participation

Spend less time worrying about compliance

6%

Average % of ineligible dependents uncovered with DependentIQ

Reduce the cost of offering employee benefits

\$3,500

Average annual savings per ineligible dependent removed with DependentIQ

# What You Need From Your Benefits Engagement Partner



**DEEP BENEFITS  
EXPERTISE**



**PLATFORM  
CONFIGURABILITY**



**APIS AND  
INTEGRATIONS**



**STRONG CARRIER  
PARTNERSHIPS**



**BENEFITS  
ENGAGEMENT**



**PLATFORM  
SECURITY**

# Powerfully Simple Benefits Management.

With a clean, intuitive and mobile-friendly engagement platform for employees and HR teams, groundbreaking API integrations and strong partnerships with leading carriers, we've got benefits covered from start to finish. PlanSource is dedicated to giving you the best experience possible for employee engagement, benefits communications, shopping, enrollment, billing, compliance and ongoing administration.



Benefits Software



Employee Engagement



Communications



Shopping



Enrollment



Billing



Compliance



Administration

# A Year-Round Benefits Platform

## **COMMUNICATIONS**

Create and schedule targeted, multi-channel communications campaigns that help you reach and engage remote workers while saving hours of HR admin time.

## **SHOPPING**

We guide employees through the process so they can shop for benefits the same way they shop for other products online.

## **ENROLLMENT**

Streamlined workflows and real-time integrations deliver a mobile-friendly enrollment experience that's designed to drive higher engagement, plan participation and HR efficiency.

## **EMPLOYEE ENGAGEMENT**

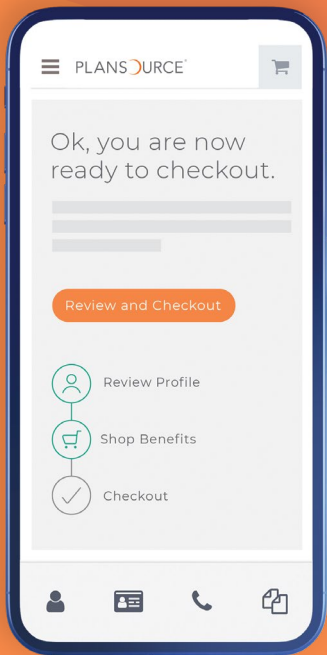
Employees consume benefits information, company initiatives and HR communications all conveniently in the palm of their hand.

## **COMPLIANCE**

We'll make sure your entire team stays compliant with Federal and State ACA requirements, plus automatically enforce and verify your unique eligibility rules and business workflows.

## **ADMINISTRATION**

Configure, manage and automatically enforce even the most complex benefit plans and eligibility workflows within one easy-to-use system.



# A Mobile-Friendly Benefits Experience

Flexibility for digital, distributed teams

**LET EMPLOYEES ROAM FREE AND  
GIVE HR TEAMS FLEXIBILITY!**

LEARN MORE AT [PLANSOURCE.COM/MOBILE](https://plansource.com/mobile)

# Help Employees Get More Out of Their Benefits

PlanSource provides an intuitive and easy-to-use shopping experience that is similar to other online interactions. Personalized content and intelligent plan recommendations are woven right into the experience, so employees understand their benefits options and make the best decisions for their needs.

LEARN MORE AT [PLANSOURCE.COM/THE-SOURCE](https://plansource.com/the-source)



**MOBILE FRIENDLY**



**COMMUNICATIONS**



**LIFE EVENT CHANGES**



**BENEFITS SHOPPING**



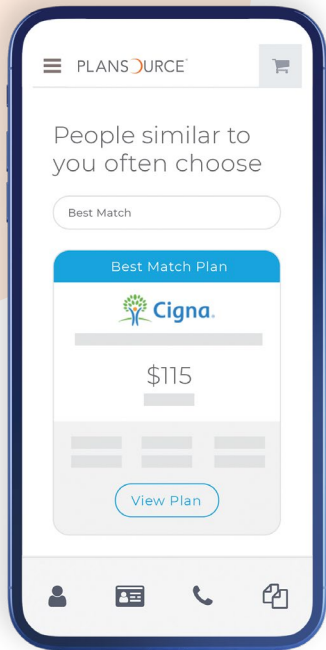
**EDUCATIONAL CONTENT**



**PERSONALIZED  
RECOMMENDATIONS**



**COMPANY NEWS**



## Empower Smarter, More Confident Benefit Decisions

PlanSource offers advanced AI and Machine Learning decision support tools that make it easy for employees to understand all of their options, which plans and coverages are the best fit, and how much it will all cost.



## DecisionIQ

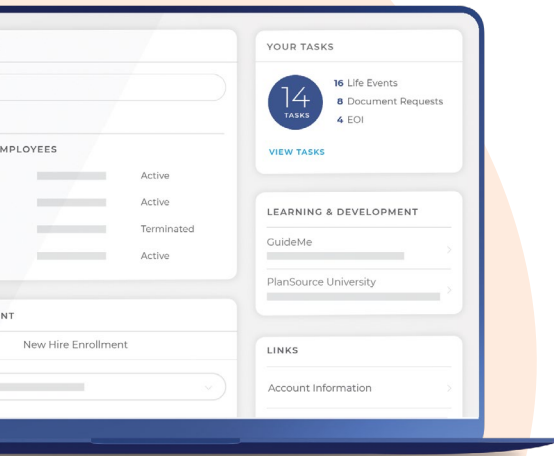
### **OUR PRESCRIPTIVE, AI-BASED DECISIONS ENGINE**

With DecisionIQ, employees receive intelligent, personalized guidance for all types of benefits, so they can navigate complex choices with ease. Our AI and Machine Learning-based models use demographic, dependent, eligibility, risk-tolerance and regional cost data to offer hyper-personalized suggestions for best-fit plans and coverage amounts.

## ALEX by Jellyvision

### **A ROBUST, CONSULTATIVE BENEFITS ADVISOR**

PlanSource has teamed up with Jellyvision to bring ALEX – its interactive benefits counselor – right into the shopping and enrollment experience. ALEX's personalized guidance helps employers and their employees save money on premiums and reduce their healthcare costs using a precise blend of subject matter expertise, behavioral science, and plain English.



# An Admin-Free Administrative Experience

So you can spend time on what matters

Managing employee benefit programs and compliance is incredibly time-consuming and complex. Companies need technology to facilitate employee education and communication, manage eligibility, automate enrollment, manage carrier billing and adhere to ACA requirements. PlanSource provides HR teams with one technology platform to efficiently manage all aspects of their benefits programs.

# With Features that Matter for HR Teams



**ACA MEASUREMENT  
AND REPORTING**



**COST  
CALCULATIONS**



**ELIGIBILITY  
MANAGEMENT**



**CUSTOMIZABLE  
REPORTING**



**DOCUMENT  
MANAGEMENT**



# Reduce Costs with AI-Driven Eligibility Verification

Whatever your rules are for eligibility documentation, DependentIQ helps you automate the process of verifying eligibility during initial benefits enrollment, open enrollment and life events.

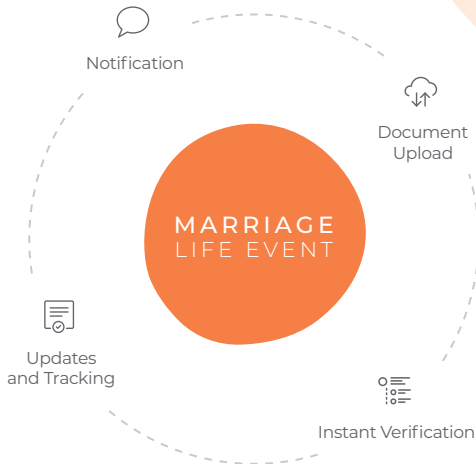
## How DependentIQ Works for a Marriage

### STEP 1: NOTIFICATION

The system notifies the employee that the marriage life event requires a marriage certificate.

### STEP 4: UPDATES/TRACKING

The employee is notified that the document is approved. HR can review any docs that weren't auto-approved.



### STEP 2: DOCUMENT UPLOAD

When it's convenient, the employee can snap a photo of the certificate from their phone and upload it to the system.

### STEP 3: AUTO-VERIFICATION

DependentIQ scans the document and instantly approves the spouse's coverage.

# Modernize Your Benefits Experience with PlanSource Boost

The benefits industry is filled with time-consuming processes that result in discrepancies, timing issues and administrative burdens. Meanwhile, consumers expect an intuitive, familiar benefits shopping experience.

That's why PlanSource has set out to revolutionize the benefits industry and create the customer experience of the future with leading insurance carriers.

## The Basics of Boost

**MODERN API INTEGRATIONS**

**OPTIMIZED SHOPPING**

## Meet Our Boost Partners



\*Medical is not a qualifying line of coverage for Boost. It is not part of the Boost program.

# Add-On Services

PlanSource Benefits Services provide value to HR teams that are consistently being asked to do more with less. HR teams are often understaffed and overworked relative to their role and impact to a company. To assist with this burden, our services provide relief by performing benefits administration tasks, so your team can focus on more strategic priorities.



**IQ Suite**



**Unlimited Text Messaging**



**Employee Contact Center**



**Ongoing Dependent Verification**



**Custom Enhanced Communications**



**Total Comp Statements**



**Full Eligibility Audit**



# Components of the PlanSource Benefits Experience

Just like an HCM, each component of our solution drives independent value

## Support Services

Call center support, billing services, total comp statements

## Core Benefits Administration

Open enrollment management, new hires, life events, EDI files

### IQ Suite

DecisionIQ  
DependantIQ  
InsightsIQ

### Boost

Improves the  
customer and  
employee  
experience

### Marketplace

Improves customer  
and employee ex-  
perience - no added  
cost or discount

## The Source

The “Google Maps of benefits,” unifies  
the entire benefits offering and drives  
24/7/365 benefits engagement – sold  
as an added PEPM

## Source + Personalized Messaging

Mass Personalization through  
automated data driven nudges pushed  
through The Source – sold as a buy-up  
to The Source and an added PEPM



Added cost to Core Benefits Administration

# About PlanSource

PlanSource helps centralize and simplify every aspect of your benefits program, so employees and HR teams can make smarter, more confident benefits decisions. We optimize the entire benefits program with leading AI/ML technology and personalized employee engagement capabilities. PlanSource believes the easier benefits are to understand, use and manage, the more value people get out of them. So we're on a mission to create the best benefits experience possible to do just that.

 2008 FOUNDED 4 LOCATIONS 800+ TEAM MEMBERS 500+ BROKERS 3,500+ CUSTOMERS 5+ MILLION CONSUMERS 70+ RESELLERS

A VISTA PORTFOLIO COMPANY

Ready to  
Get Started?

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