

Boost Carrier Requirements (at least 1 line must be fully-insured)	Aflac	Allstate	Cigna	Guardian	Hartford	Lincoln Financial Group	MetLife	Mutual of Omaha	Prudential	Reliance Standard	Sun Life	The Standard	Unum	Voya
Minimum # of benefit eligible employees	100+	1,000+	100+	100+*	100+*	100+*	100+ Core 200+ VB	100+*	100+	100+	100+*	100+*	100+*	250+**
PRODUCTS														
Accident	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Basic Life and AD&D	●		●	●	●	●	●	●	●	●	●	●	●	●
Cancer		●		●			●				●			
Critical Illness	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Dental	●		●	●		●	●	●			●	●	●	
Hospital Indemnity	●	●	●	●	●		●		●	●	●	●	●	●
LTD	●		●	●	●	●	●	●	●	●	●	●	●	●
Permanent Life/Whole Life		●											●	
STD	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Vision	●			●		●	●	●			●	●	●	
Voluntary Life and AD&D	●		●	●	●	●	●	●	●	●	●	●	●	●
Voluntary LTD	●		●	●	●	●	●	●	●	●	●	●	●	●
Voluntary STD	●		●	●	●	●	●	●	●	●	●	●	●	●
Form Required?	No	No	Yes	No	No	No	Yes - NSCA and Fee Authorization	No	No	No	No	No	Yes	No
Underwriting Required?	No	No	Yes	No	No	No	Yes	No	No	No	Yes	No	Yes	No
Limitations or Exclusions?	No limitations	No limitations	Excluding AD&D and ASO STD	Excluded: stand-alone AD&D, State disability – NJ TDB, NYDBL, HI TDI	No limitations	Excluding advice to pay, ASO, all leave/absence management services, EAP	No limitations	No limitations	NH-Pending 3 worksite. NY-Pending HI, AI. OR-Pending HI. WA-Pending all 3	No limitations		No HI or MT business available	Vision not approved in NY or RI. Limitations on vision in ME and MA.	Issues with some products in NY, but write all 50 states

Note: Cases with 5,000+ employees must be custom quoted by PlanSource and the carrier.

* This carrier will sell through a reseller to cases with fewer than 100 employees.

** Voya will sell through a reseller to cases with 100+ employees

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EOI API (SSO and/or Automated Decision Notification)			Available	Available	SSO available for Early Adopters	SSO available for Early Adopters	Available to groups with 100+ ee's		Available				SSO only	SSO only
Plan Configuration API				Available										
Find a Provider API		N/A		Available	N/A	N/A	Available for Early Adopters		N/A				N/A	N/A
Enrollment API				Available										
Member Portal API				Coming in Q1 2021										

Boost Carrier Requirements	Cigna	MetLife	Unum
Process steps for form and underwriting requirements	<p>New business: PlanSource reps need to make sure the Cigna Rep has notified their UW team to take our agreement into consideration. This means they will load their rates accordingly, by product, per our arrangement. Cigna will then initiate the Acknowledgement form with the client to obtain their signature, as well as the broker and PlanSource.</p>	<p>New business: PlanSource reps need to make sure the MetLife Rep has notified their UW team to take our agreement into consideration. This means they will load their rates accordingly, by product, per our arrangement. MetLife will initiate the Service Fee Disclosure and Authorization form with the client, as well as the Fee Authorization form that PlanSource will be required to sign.</p>	<p>New business: PlanSource reps need to make sure the Unum Rep has notified their UW team to take our agreement into consideration. This means they will load their rates accordingly, by product, per our arrangement. The Unum Rep will initiate the Standard Commission Agreement form with the client to obtain their signature, as well as the broker and PlanSource. Through Unum's implementation process, the forms will auto-generate and send to the contact(s) identified in their system (PlanSource & broker). The Unum rep is responsible for getting the broker signature, PlanSource reps only need to get the PlanSource signature. Send to Kylee VanOrden to have the form completed for PlanSource.</p>
	<p>Existing business: Our Boost Carrier Overlay team is reaching out to the broker/client to get the required form signed.</p>		