

— PLANSOURCE —
ECLIPSE

**Making Better Connections:
System Integrations with HR, Benefits, Payroll and More**

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Agenda

Introduction

PlanSource Integrations

Completed Integrations

Integrations In Progress

Strategy and Roadmap

Integrate With PlanSource

Q&A



Introduction



What are the Benefits of an Integration?

Introduction



Enhanced user experience



Standardized practices



Improved automation capabilities



Bidirectional referral opportunities



Increased product offerings



Seamless data exchange



PlanSource Integrations

Employee Self Service	Evidence of Insurability	Subscriber	Dependent	Key Coming Soon Available Now
Payroll	Single Sign-on	SAML	Coverages	
Beneficiaries	OAuth	Advanced Payroll Deductions	OpenID	

Ultimate
SOFTWARE

ORACLE | **NETSUITE**

bambooHRTM

cloudMills

Paycor[®]


GUARDIAN[®]

 **MetLife**

Anthem[®]

unumSM

 **Allstate**[®]
You're in good hands.

Colonial LifeSM
Making benefits count.

Beneration 

What type of integration are you most interested in?

- A. Single Sign-on (SSO)
- B. Demographic
- C. Payroll
- D. Coverages
- E. Evidence of Insurability (EOI)
- F. Other

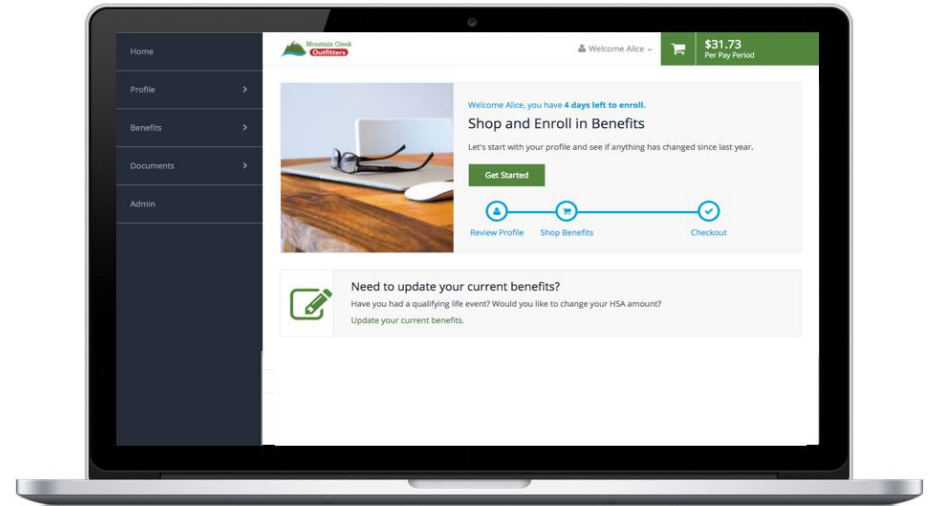
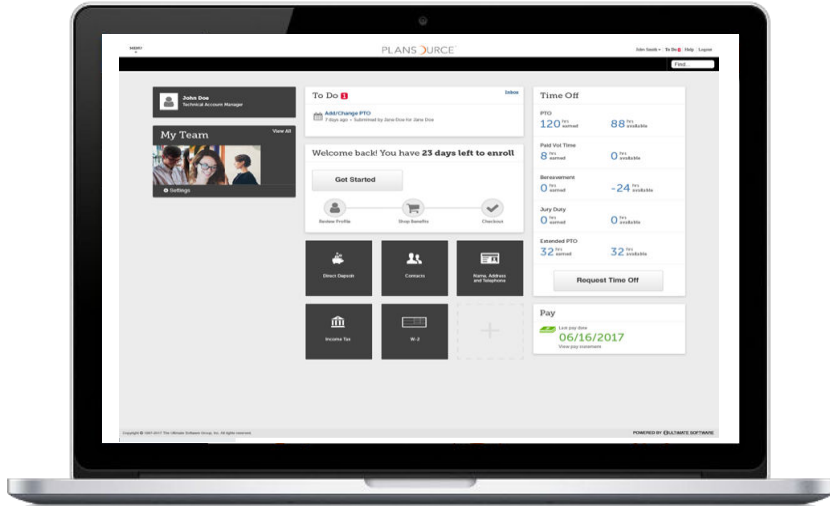


Completed Integrations

Employee demographic data

Payroll deductions

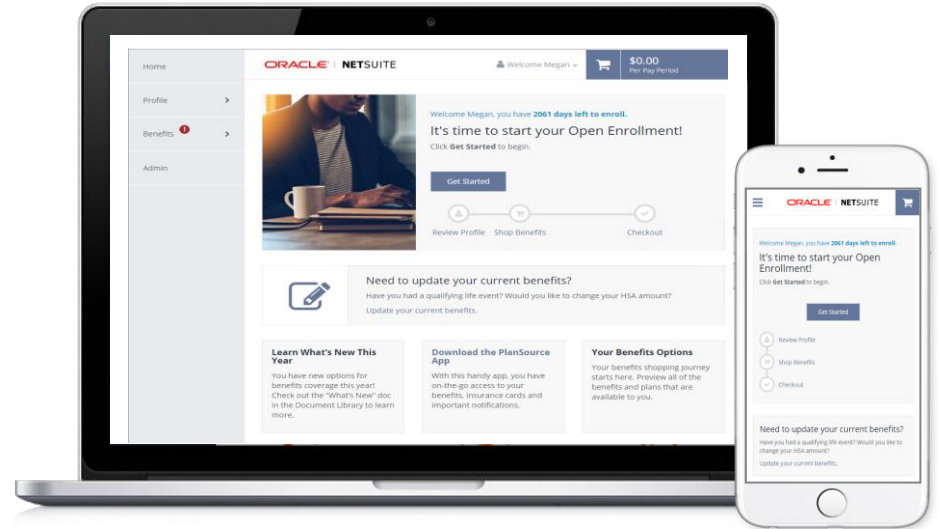
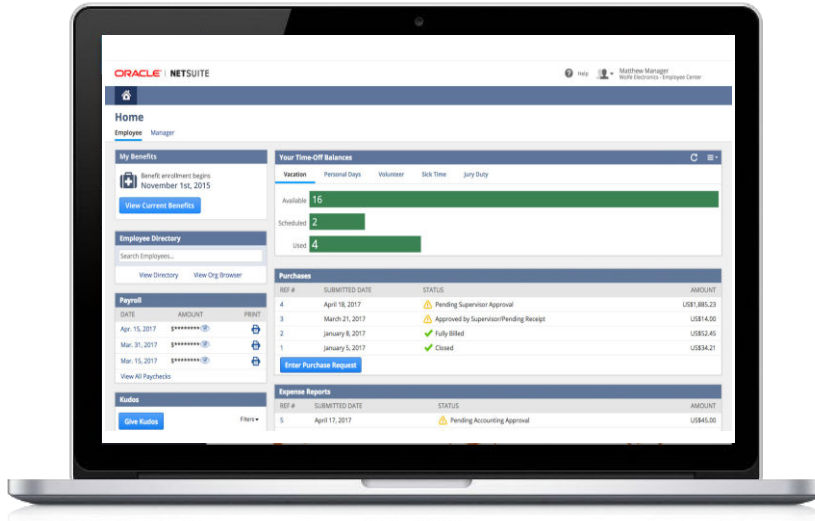
Near real-time integration



Employee demographic data

Payroll deductions

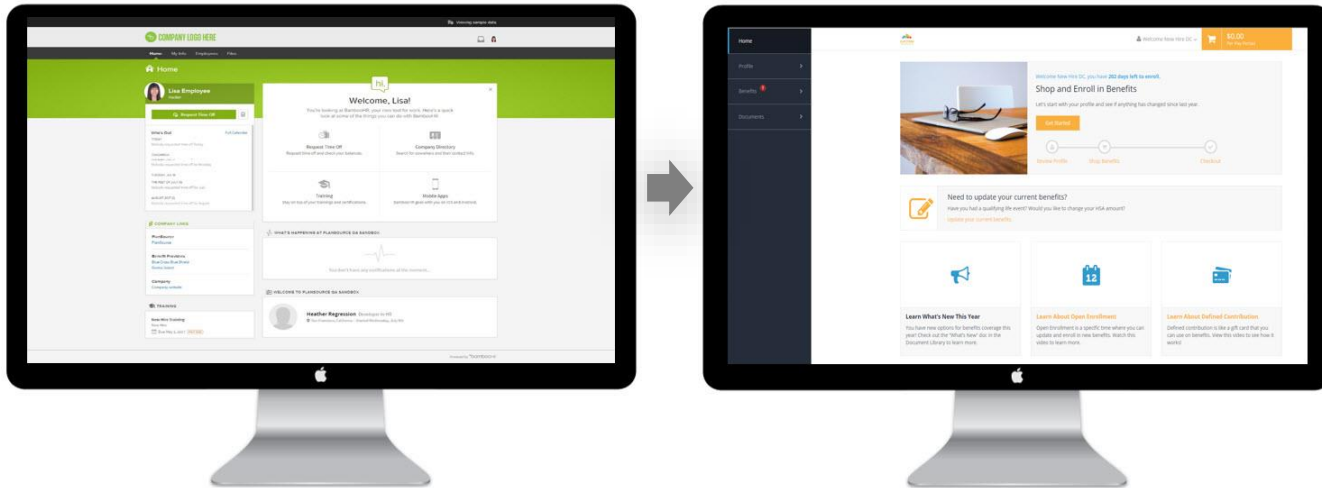
Near real-time integration



Employee demographic data

Synced 4 times daily

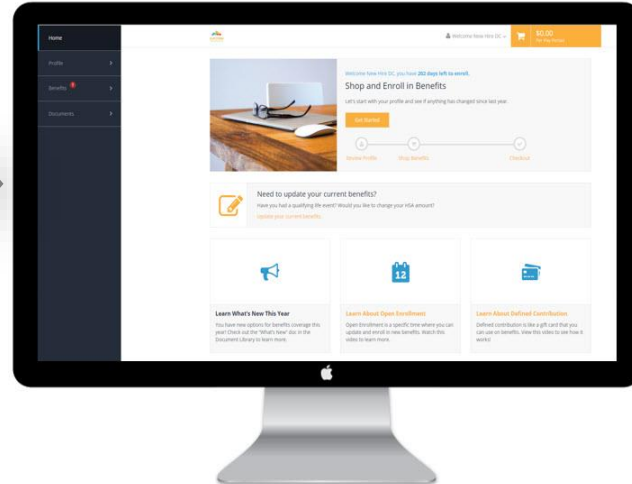
Employee single sign-on

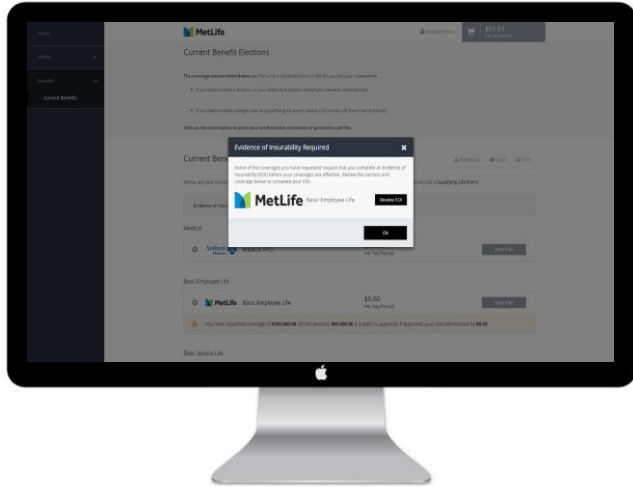


Employee demographic data

Payroll deductions

Employee single sign-on





Statement of Health

Complete the Statement of Health online

We need a Statement of Health for one or more of these reasons Testing:

- You've applied for additional coverage
- You've applied for coverage outside of the enrollment period
- Your plan requires it

Note: If we don't receive your Statement of Health, you will not receive the amount of coverage that requires a Statement of Health.

To view your Statement of Health documents please click on [My Documents](#) link.

▼ See more ▼

You need to complete your Statement of Health.

SK4 Test

Basic Life		Complete Online Now
Coverage that doesn't require proof of good health:	\$1,000.00	
Coverage that requires proof of good health:	\$99,000.00	
Total coverage requested:	\$100,000.00	

Your dependent needs to complete the Statement of Health.

First Last

Dependent Life		Please provide your dependent's email address so we can email your dependent a link to the online Statement of Health.
Coverage that doesn't require proof of good health:	\$15,000.00	
Coverage that requires proof of good health:	\$5,000.00	
Total coverage requested:	\$20,000.00	

[Provide Email Address](#)

Prefer to print the Statement of Health and have your dependent return it to us?
[Download form](#)

[My Documents](#)

Need Help?

- [Technical Question?](#)
- [Statement of Health Question?](#)

[Read our FAQs](#)



Integrations In Progress

Enrollment Widget

Integrations In Progress

The screenshot shows the PLANSOURCE user interface for John Doe, Technical Account Manager. The interface includes a navigation bar with a search bar and a user profile. The main content area is divided into several sections:

- To Do:** A notification for "Add/Charge PTO" submitted by Jane Doe for Jane Doe, 7 days ago.
- Welcome back! You have 23 days left to enroll:** A prominent message with a "Get Started" button and a progress indicator showing three steps: Review Profile, Shop Benefits, and Checkout.
- Time Off:** A summary of various leave types:
 - PTO: 120 hrs earned, 88 hrs available
 - Paid Vol Time: 8 hrs earned, 0 hrs available
 - Bereavement: 0 hrs earned, -24 hrs available
 - Jury Duty: 0 hrs earned, 0 hrs available
 - Extended PTO: 32 hrs earned, 32 hrs available
- Pay:** Information about the last pay date, 06/16/2017, with a link to view pay statements.
- My Team:** A section for viewing team members, currently showing three photos.
- Settings:** A link to access user settings.
- Direct Deposit, Contacts, Home, Address and Telephone, Income Tax, W-2:** Quick links for various HR and personal information tasks.

The screenshot shows the BAMBOOH user interface for John Doe, Technical Account Manager. The interface is clean and modern, with a green header and a white main content area. The main content area is divided into several sections:

- Welcome, John!:** A large welcome message with a "hi." icon and a quick look at some of the things you can do with BambooHR.
- Request Time Off:** A prominent button for requesting time off.
- Who's Out:** A section showing who is out today, tomorrow, and on specific days (Wednesday, Thursday, Friday).
- Request Time Off:** A button for requesting time off.
- Company Links:** A section with links to PlanSource, Benefits Providers, and Company website.
- TRAINING:** A section showing new hire training information, including a due date of June 30, 2017.
- Benefits:** A section with a "Do You Need to Update Your Benefits?" message and a "Update Your Benefits" button.
- WHAT'S HAPPENING AT PLANSOURCE QA SANDBOX:** A section with a "You don't have any notifications at the moment..." message.

Home

PLANSOURCE

Welcome Elizabeth \$123.45 per pay period

Welcome Elizabeth, you have **23 days left to enroll.**

Shop and Enroll in Benefits

Let's start with your profile and see if anything has changed since last year.

[Get Started](#)

Review Profile Shop Benefits Checkout

Compensation & Benefits

A great company provides a lot more than just a paycheck. Get a complete view of your total compensation.

[View My Total Compensation Statement](#)

Need to update your current benefits?

Have you had a qualifying life event? Would you like to change your HSA amount?

[Update current benefits](#)

Partner Offers

Your employer has several financial wellness offers from trusted partners that could benefit you and your family.

Download the PlanSource App

With this handy app, you have on-the-go access to your benefits, insurance cards and important notifications.

Learn about open enrollment

Open Enrollment is a specific time where you can update and enroll in new benefits. Watch this video to learn more.

Home

PLANSOURCE

Welcome Elizabeth \$123.45 per pay period

Total Compensation Statements

Statements will be available below to summarize your total compensation & benefits for each calendar year.

2017

Total Compensation Statement

[Available January 2018](#)

2016

Total Compensation Statement

[View 2016 Statement](#)

2015

Total Compensation Statement

[View 2015 Statement](#)

The screenshot displays the Limelight Health web application interface. At the top left is the logo "LimelightHealth" with the tagline "EMPLOYEE BENEFITS MANAGEMENT". The top navigation bar includes links for HOME, GROUPS, ALL PROPOSALS, TOOLS, and a user profile for "Data User Broker". Below this, the page title is "PlanSource Jonah QuotePad Test 3" and the active menu item is "Enrollment".

The main content area features a video player with the title "One great solution." and three icons representing the enrollment process: "Quote differently.", "Present & Sell efficiently", and "Enroll simply." The video player shows a play button, a progress bar at 00:27, and the Vimeo logo.

Below the video is the heading "Online Enrollment in 3 Easy Steps (BETA)" followed by three numbered steps:

1. Connect to your enrollment platform of choice
2. Send sold proposals data to your enrollment platform
3. Employees login to enroll online

At the bottom, there is a "Select Enrollment Platform" dropdown menu, a "Connect" button, and a "Download Group Information" link with a download icon.



Enhanced user experience



Standardized practices



Improved automation capabilities



Bidirectional referral opportunities



Increased product offerings



Seamless data exchange



Strategy and Roadmap



CRAWL



WALK



RUN

“If you can’t fly then run, if you can’t run then walk, if you can’t walk then crawl, but whatever you do you have to keep moving forward.” -- *Martin Luther King, Jr.*

Use cases

Endpoints

Announcements

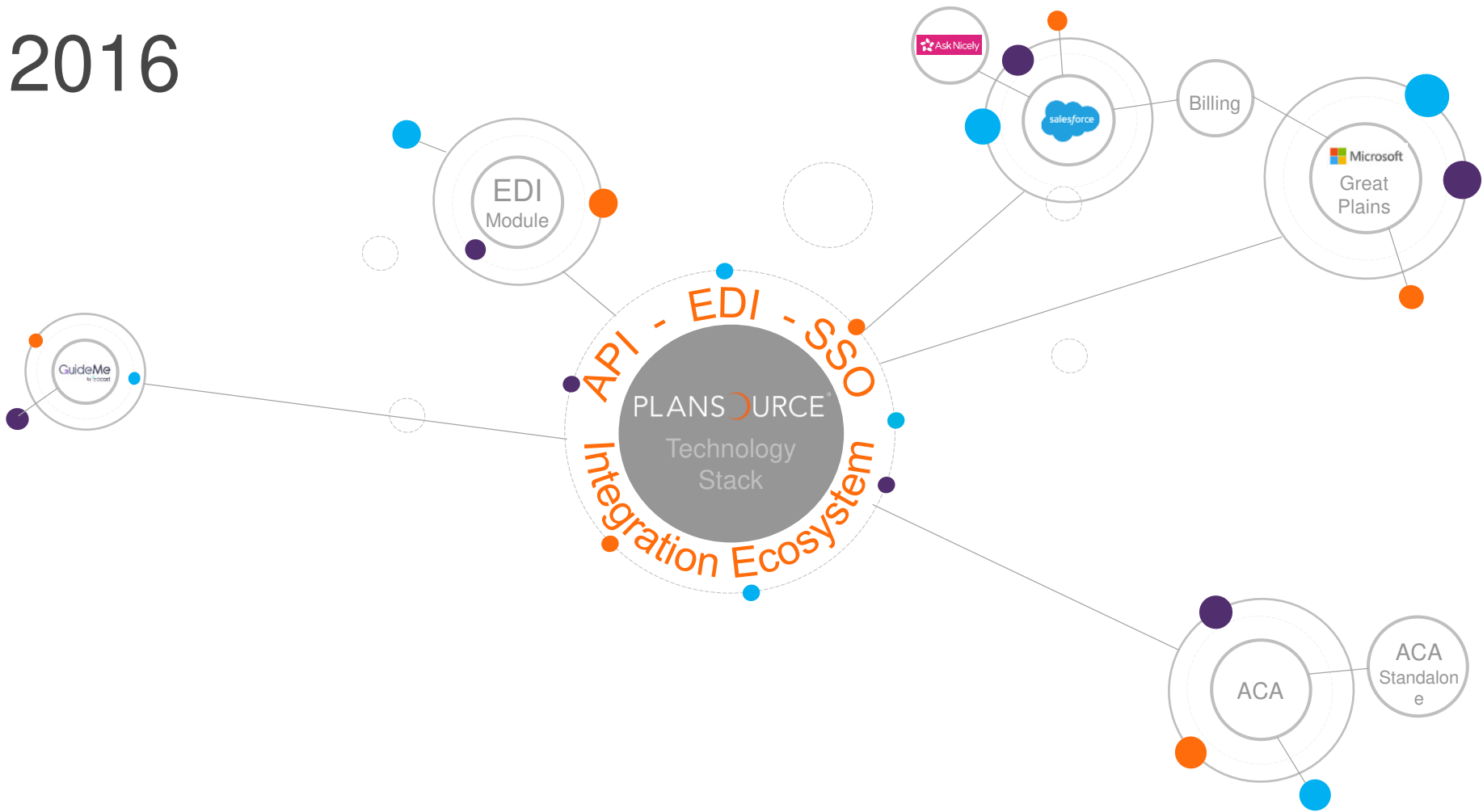
Versioning

The screenshot displays the PlanSource Admin API developer portal. On the left is a sidebar with a search bar and a list of endpoints under the 'Subscriber' category. The main content area shows three API endpoint details:

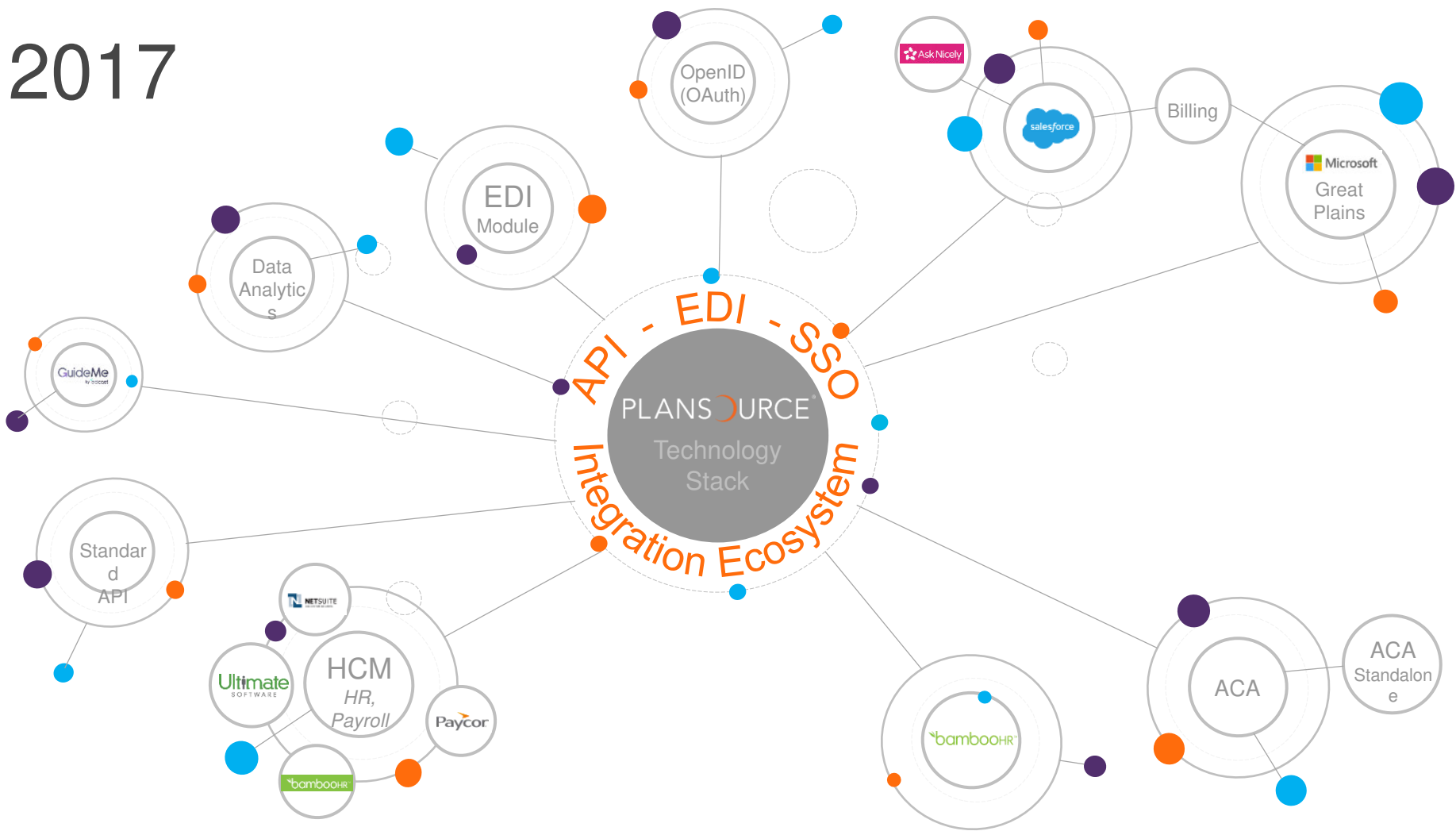
- /subscribers**: Create Subscriber resources. Includes a 'Try it' button and a code editor with a curl command and a Python script.
- /subscriber**: Create a Subscriber resource. Includes a 'Try it' button and a code editor with a curl command and a Python script.
- /subscribers**: Retrieve the Subscriber resources. Includes a 'Try it' button and a code editor with a curl command and a Python script.

Each code editor shows a curl command and a Python script for interacting with the API. The Python scripts use the requests library to perform HTTP requests and print the response body.

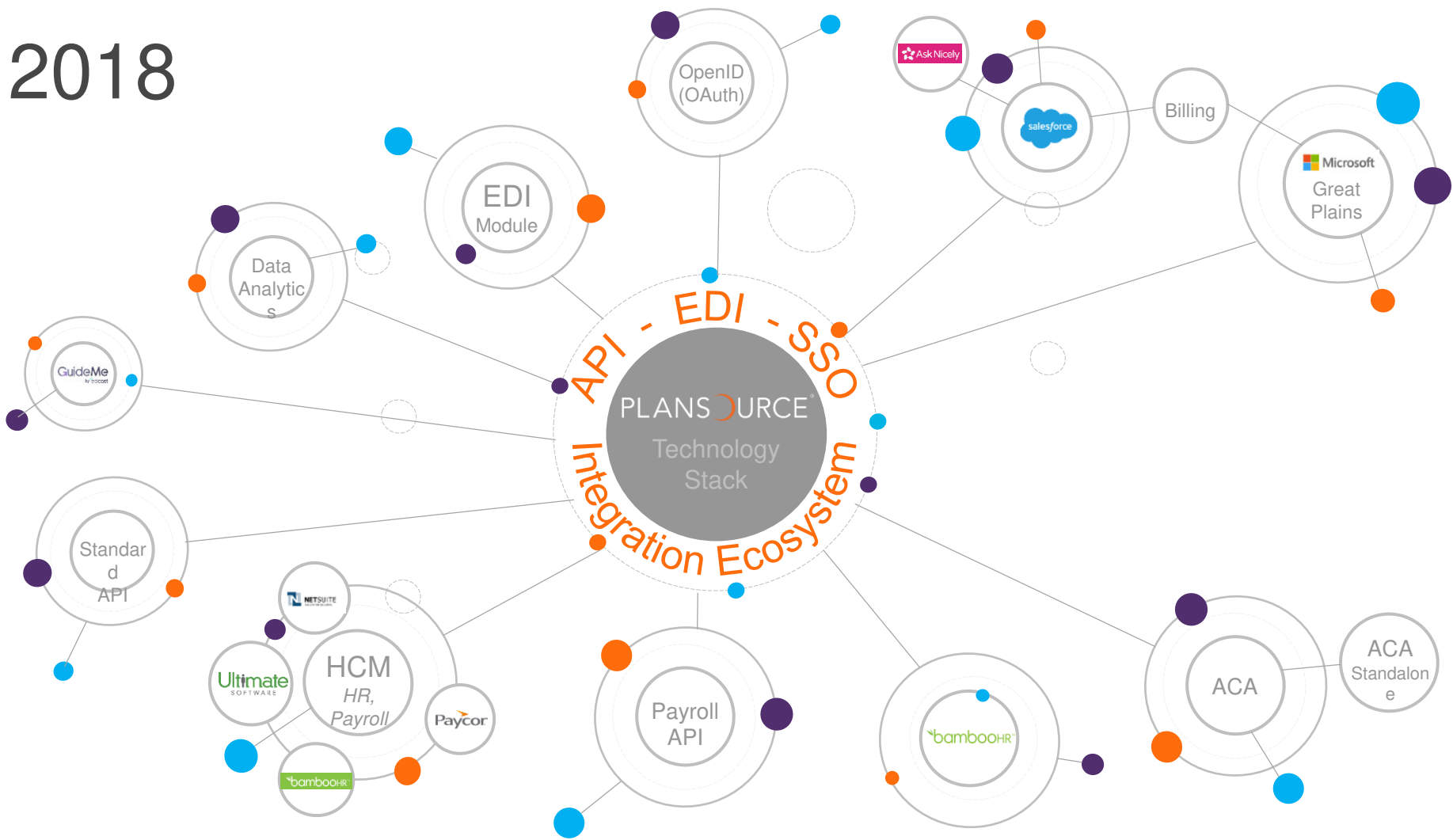
2016



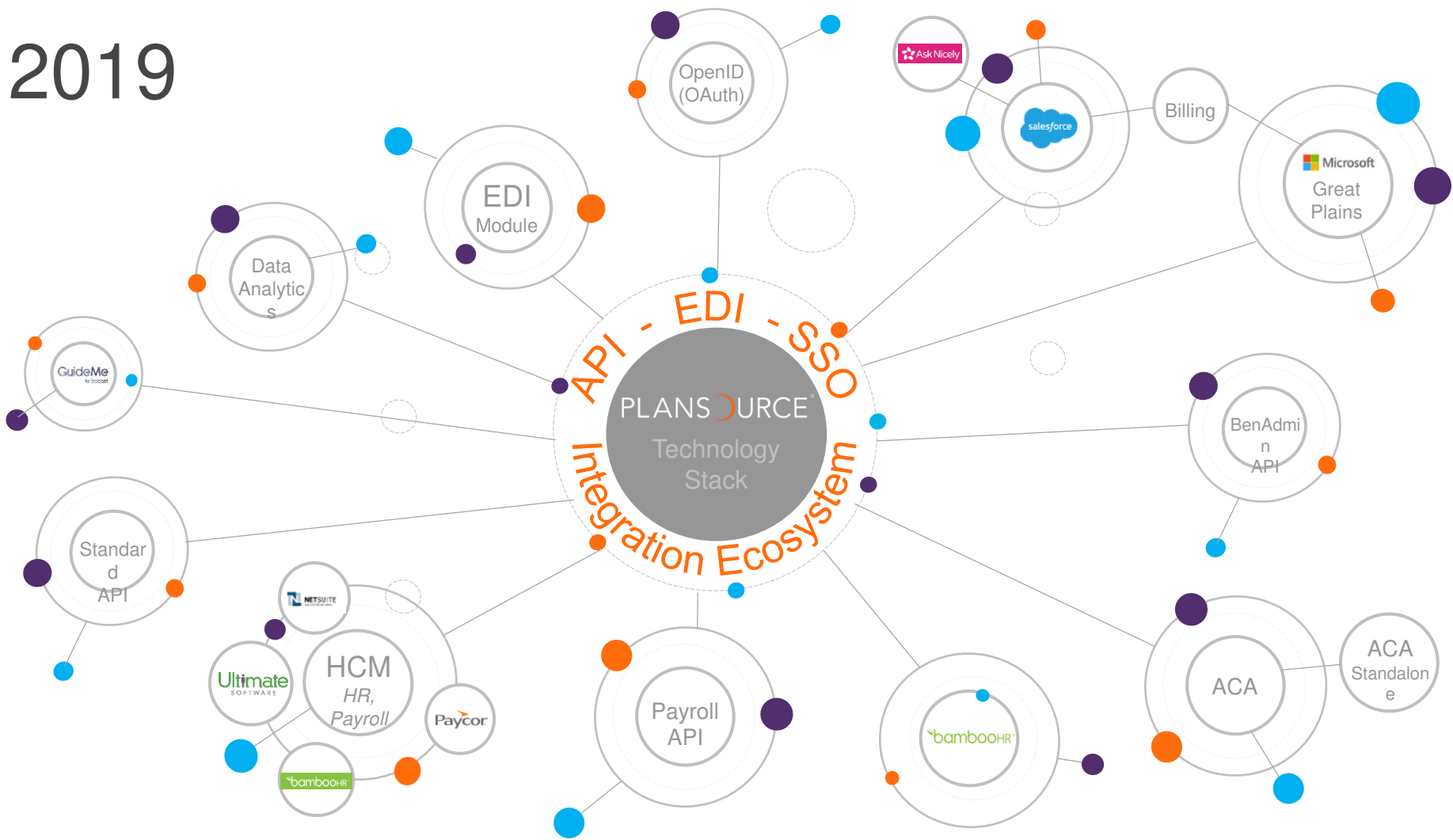
2017



2018



2019





Integrate With PlanSource

Contact Information

Integration Type

Integration Features

Why Integrate?

Integration Experience

Supporting Information

The image shows a screenshot of the PlanSource Partner Integration Questionnaire. The form is titled "PLANSOURCE Partner Integration Questionnaire" and is divided into three main sections: "REQUESTOR CONTACT INFORMATION", "INTEGRATION TYPE", and "INTEGRATION FEATURES".

REQUESTOR CONTACT INFORMATION

Company

Name [Company Name]

Address [Street Address] Building/Suite [Optional]

City [City] State [State] Zip [Zip] Country [Country]

Business Contact

Name [Name] Phone [Phone] Email [Email]

Technical Contact

Name [Name] Phone [Phone] Email [Email]

INTEGRATION TYPE

Which of PlanSource's integrations are you interested in? (Check all that apply)

- Employee Self Service (available now)
- Single Sign-On (available now)
- Demographic Data (Beta Spring 2017)
- Standard Payroll (Beta Spring 2017)
- Coverages (Coming Fall 2017)
- Beneficiaries (Coming Fall 2017)
- Evidence of Insurability (available now)

INTEGRATION FEATURES

Which integration features do you require?

- Near Real-Time
- Delayed
- Historical
- Other

What is the required frequency of the data exchange?

- Near Real-Time
- Hourly
- Daily
- Weekly
- Other (Please explain)

Will the data be stored longer than the time of a single request?

- No
- Yes (Please explain)

At the bottom of the form, there is a URL "www.plansource.com" and a small circular logo.

1

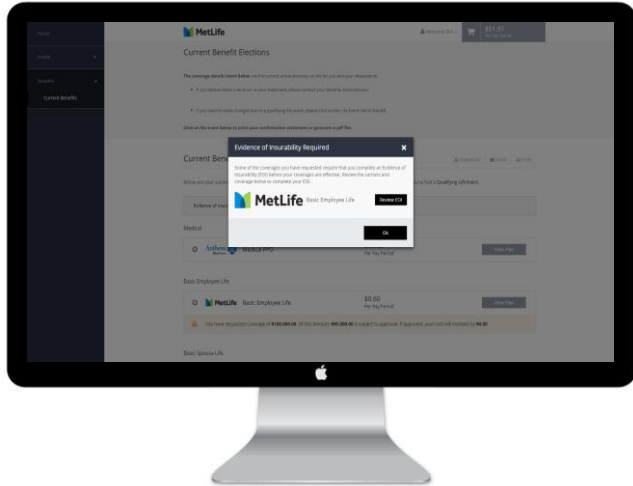
**Discovery
Fit
Investigate**

2

**Planning
Technical
Contract**

3

**Develop
Pilot
Market**



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Endorsement from PlanSource

- Badging to display on partner website
- Callout out on PlanSource website





Q&A



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