

# LAUNCH PACKAGES

## FLEXIBLE OPTIONS TO FIT YOUR IMPLEMENTATION NEEDS AND TIMELINE

We understand your success is more than just a tool. You also need the right strategy, processes and people behind it to really maximize your benefits technology investment. That's why we have an entire Launch team dedicated to ensuring you're getting the most out of PlanSource right from the start. Whatever your implementation needs and goals, we've got a plan to help get you set up, live and seeing results quickly.



**PlanSource is thorough and responsive. We had an amazing, dedicated team that took us to a smoothly operating system.**

Sarah Dare, Benefits Coordinator  
Bloomfield Hills School District



### FASTER TIME-TO-VALUE

Our structured approach and detailed project plan ensures everyone stays on track, on time and up-to-date for a smooth, successful launch from kickoff through go-live



### MAXIMUM EFFICIENCY

We clearly define your requirements, benefits configurations and processes upfront, so your system is set up to meet your specific needs



### HIGHER ADOPTION
















We'll help train and enable your entire HR team, giving them the tools they need to not just use the system, but to really get the most out of it



### SCALABLE GROWTH

We want you to be wildly successful with PlanSource, so we deliver a high-quality experience that'll set your team and your system up for long-term success

# WHICH LAUNCH PACKAGE IS RIGHT FOR YOU?

	<b>STARTER</b> Ideal for groups who have straightforward benefits, limited budget and a dedicated internal resource who are comfortable running this self-led approach	<b>STANDARD</b> For customers who want the flexibility of a self-led implementation model but with greater accessibility to PlanSource's team for guidance and support	<b>SELECT</b> A high-touch experience for customers who don't have the time or resources to commit and need PlanSource to lead the entire project
<b>ENROLLMENT STYLE</b>	 <b>Active Only</b> You're looking to launch at open enrollment and require employees to log in, so you don't need to bring over any existing coverages	 <b>Active, Passive or Mid-Year</b> You want to have a passive OE or a mid-year go-live, so you'll need to migrate coverage data from another system	 <b>Active, Passive or Mid-Year</b> You want to have a passive OE or a mid-year go-live, so you'll need to migrate coverage data from another system
<b>PROJECT PRIORITIES</b>	 <b>Budget</b> You're more price-sensitive and willing to take on more of the work to help lower costs	 <b>Budget + Support</b> Budget is an important factor, but you also know you'll need additional support from PlanSource	 <b>Timeline + Quality</b> Your primary focus is hitting the timeline and ensuring a high-quality launch
<b>BENEFITS COMPLEXITY</b>	 <b>Low</b> Your benefits and plan rates are fairly straightforward, without a lot of options or variations	 <b>Medium</b> You have some specific eligibility rules or rates for your workforce populations, but overall it's not too complex	 <b>High</b> You need to solve for a lot of different and/or complicated scenarios, like union benefits or state-specific plans
<b>TIME/EFFORT COMMITMENT</b>	 <b>High</b> Getting the system live is your #1 priority, and you're able to dedicate significant time to completing the project via self-service tools	 <b>Medium</b> You have time and internal resources to focus on this project but still want a lot of support from PlanSource	 <b>Low</b> Your HR team is stretched thin and can't commit much time, so you need PlanSource to do the heavy lifting for you
<b>TECH PROFICIENCY</b>	 <b>High</b> You're very comfortable with technology and prefer self-service training and tools	 <b>Medium</b> You're comfortable with self-service tools but you'll likely need some assistance	 <b>Low</b> You prefer a high-touch experience over self-service training and tools

# LAUNCH PACKAGES AND PRICING

	STARTER \$4,000	STANDARD \$6,000	SELECT \$10,000
<b>EXPERIENCE</b>			
Enrollment Style	Active Only	Active, Passive or Mid-Year	Active, Passive or Mid-Year
PlanSource Project Support	Low	Medium	High
Launch Team	Project Manager	Project Manager Onboarding Specialist Configuration Analyst EDI Analyst	Project Manager Onboarding Specialist Benefits Coach Configuration Analyst EDI Analyst
Benefits Configuration	Customer-Driven	Shared Effort	PlanSource-Driven
Training	On-Demand	On-Demand + 1 Custom Session	On-Demand + 2 Custom Sessions
Support Transition	1 Week After Open Enrollment Close	1 Week After Go-Live/Open Enrollment Close	2 Weeks After Go-Live/Open Enrollment Close
<b>PRODUCT AND SERVICES ADD-ONS</b>			
ACA Measurement and Reporting	\$1,250	Included	Included
Data Conversion	\$2,500 Demographic Data (Max 40 Hours)	Included Demographic and Coverage Data	Included Demographic and Coverage Data
Employee Contact Center	\$2,500	\$2,500	\$2,500
Inbound Employee SSO (SAML 2.0)	\$250 \$175 Per Hour for Custom SSO	Included \$175 Per Hour for Custom SSO	Included \$175 Per Hour for Custom SSO
<b>INTEGRATIONS ADD-ONS</b>			
Boost Carriers	Included	Included	Included
Non-Boost Carriers	Medical Included; \$1,250 Per Additional Carrier	Medical Included; \$1,250 Per Additional Carrier	Medical Included; \$1,250 Per Additional Carrier
Carrier Connect	Included for Boost Carriers	Included for Boost Carriers	Included for All Participating Carriers
Integrated HCM Providers	Included for BambooHR \$1,250 for ADP, Paycor, Ultimate	Included for ADP, BambooHR, Ultimate \$1,250 for Paycor	Included for ADP, BambooHR, Ultimate \$1,250 for Paycor
Non-Integrated HCM Providers	\$2,500 Per HCM Provider	\$2,500 Per HCM Provider	\$2,500 Per HCM Provider
HSA/FSA/HRA (Non-PlanSource)	\$1,250 Per Integration or File	\$1,250 Per Integration or File	\$1,250 Per Integration or File
COBRA (Non-PlanSource)	\$2,500 Per COBRA Administrator	\$2,500 Per COBRA Administrator	\$2,500 Per COBRA Administrator