PLANSOURCE®

One Source. Many Benefits.

Presented to OneDigital
Customers and Partners

December 14, 2017

Today's Speakers
Introductions

Joanne Wacker

Vice President, Operations and Administration Services

Anita Messal

Chief Operating Officer and Executive Sponsor for OneDigital partnership

Nancy Sansom

Chief Marketing Officer

OneDigital Minneapolis Selects PlanSource to Run Benefits Technology

PlanSource will provide OneDigital Minneapolis customers with industry-leading software and services for benefits administration. In addition, a subset of OneDigital employees who work with benefits administration will now be employed directly by PlanSource and work out of its Minneapolis office.

Agenda

PlanSource and OneDigital Partnership

PlanSource Differentiators

Software Overview and Demonstrations

Optional Benefits Services

Next Steps

Will the webinar be recorded?

Yes!
We will send you a link to the recording after the webinar.
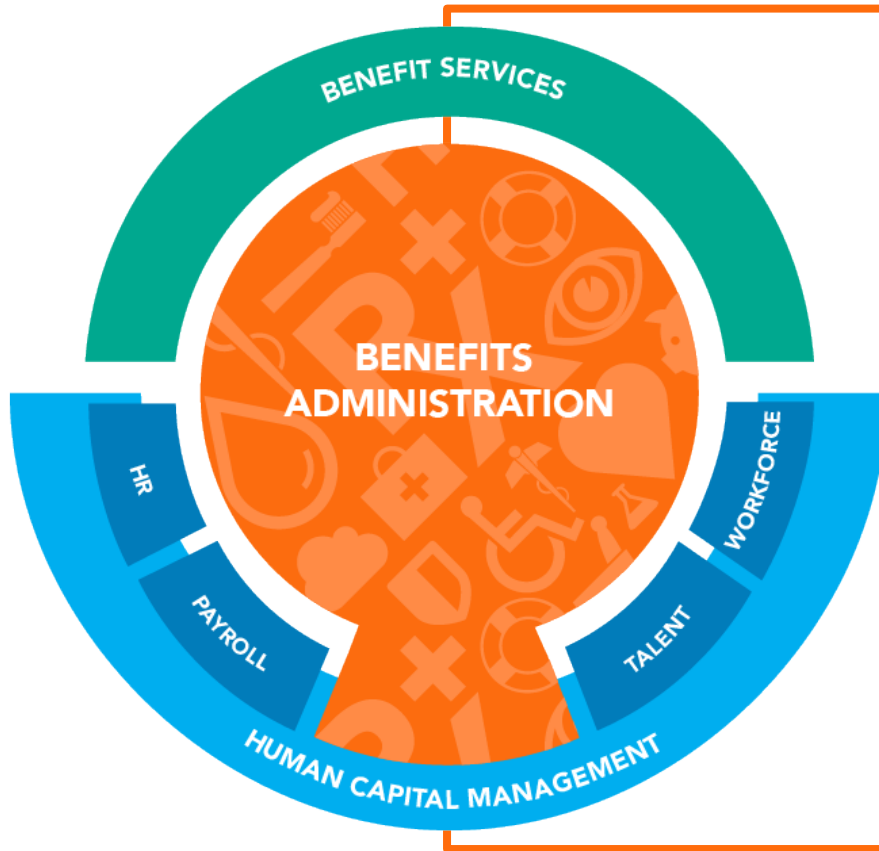
PLANSOURCE

Will the slides be available?

Yes!
We will send you a link to the PDF
after the webinar.

Better Technology for a Better Benefits and HR Experience

PlanSource provides flexible and intuitive benefits administration software and services to nearly 3.5 million consumers.
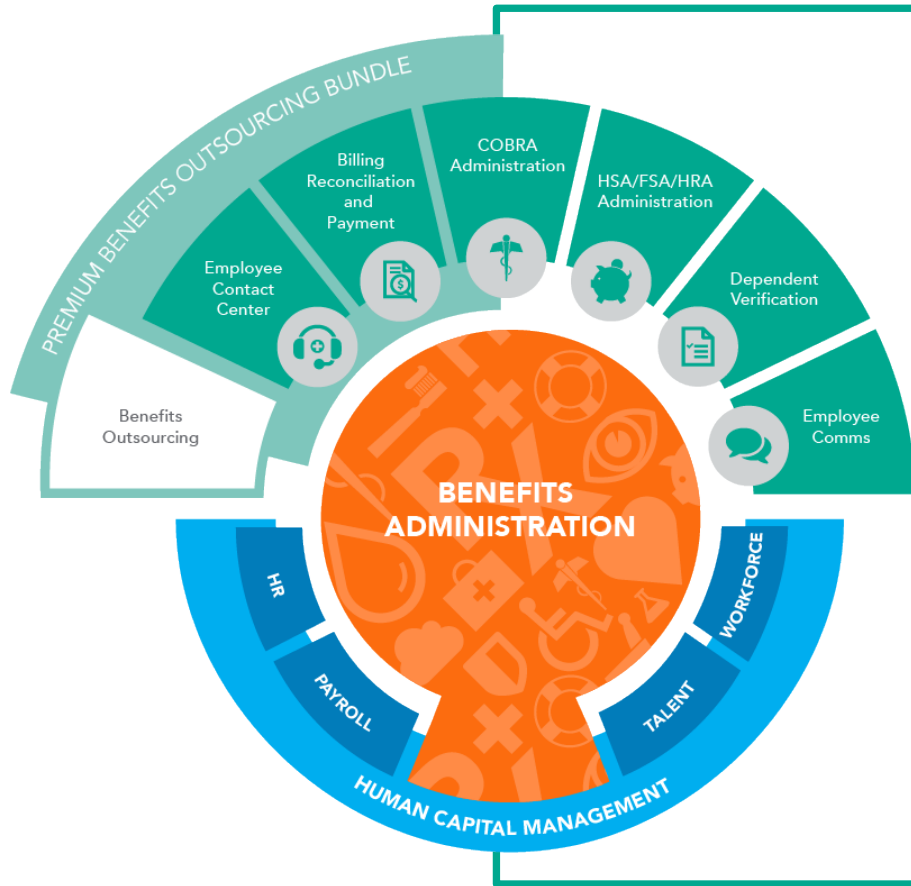
Benefits-Centric HCM Solution

Benefits administration technology is the center of our universe, surrounded by leading solutions for human capital management.

PlanSource Benefits Administration

Flexible and intuitive multi-carrier benefits platform

BENEFITS ADMINISTRATION

- *Shopping*
- *Enrollment*
- *Billing*
- *Compliance*
- *Administration*

Software + Services = Best Benefits Experience

PlanSource offers a full suite of benefit services that ensures that you get the most out of your benefits technology investment.

Customers Representing All Industries
Including ~75 school systems

Large Organizations Rely on PlanSource

300+ Employers with 1,000+ Employees

Agile-1 — 23,000 Employees	**at home** The Home Décor Superstore — 3,300 Employees	**AIRBUS** — 1,300 Employees
CalARTS — 1,600 Employees	**CENTRAL FREIGHT LINES INC.** — 1,700 Employees	**Compassion** Releasing children from poverty in Jesus' name — 1,000 Employees
Greenville County — 3,000 Employees	**EP Entertainment Partners** an employee owned company — 17,000 Employees	**THE EVANGELICAL LUTHERAN Good Samaritan Society** — 16,000 Employees
fitbit — 1,300 Employees	**AUSTIN** Independent School District — 18,000 Employees	**goodwill** — 2,100 Employees
Hawaiian Telcom — 2,000 Employees	**BOSS HUGO BOSS** — 1,100 Employees	**IVY TECH COMMUNITY COLLEGE** — 11,000 Employees
Lam RESEARCH — 6,000 Employees	**Learning Care group** — 19,000 Employees	**School District 51 MESA COUNTY VALLEY** Every student, every day, learning for life! — 3,400 Employees
Panera BREAD — 4,000 Employees	**PLANET HOLLYWOOD** — 8,000 Employees	**REAL MEX RESTAURANTS** — 9,000 Employees
Saber HEALTHCARE GROUP — 12,000 Employees	**SUN PHARMA** — 1,400 Employees	**snapchat** — 1,200 Employees
U.S. SECURITY ASSOCIATES — 45,000 Employees	**VALLEY PRESBYTERIAN HOSPITAL** — 1,800 Employees	**verizon wireless** — 5,000 Employees
WR WESTGATE RESORTS — 7,300 Employees		

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PlanSource Loves Small and Mid-Sized Customers

Average Customer Size of 550 Employees

American Museum of Natural History *725 Employees*	Ashley Furniture Homestore *475 Employees*	Bumble Bee Foods, LLC *550 Employees*	Carroll Fulmer *500 Employees*	Delta Private Jets *300 Employees*	Ebates Where it Pays to Shop Online *200 Employees*	ergobaby™ *130 Employees*
Guthy|Renker *650 Employees*	Hilton Garden Inn *542 Employees*	Hildebrandt Learning Centers *990 Employees*	Holiday Inn Express *285 Employees*	Jacuzzi *501 Employees*	KeyImpact Sales & Systems, Inc. *850 Employees*	Kubota For Earth, For Life *750 Employees*
McCaffrey's Food Markets *1,000 Employees*	mindjet *150 Employees*	Parks & Coffee *360 Employees*	Perkins Restaurant & Bakery *477 Employees*	Redwood Community Services, Inc. www.rcs4kids.org *170 Employees*	snap KITCHEN *750 Employees*	SoCal Penske Dealer Group *1,200 Employees*
TAOS *642 Employees*	The Loveless Cafe Hot Biscuits, Country Ham *140 Employees*	The Salvation Army *167 Employees*	TRINA TURK *200 Employees*	Van Buren County Hospital Simply Remarkable *138 Employees*	xero *250 Employees*	zerochaos *502 Employees*

PlanSource By The Numbers

Partner with a market leader in benefits and HR technology

2008
founded

HR Tech
provider since 1997

550+
employees

6
locations

SSAE16 SOC2
Type 2 Audited

18,000+
data exchange connections

700+
System integrations

+74 NPS
~3x the SaaS average

Real-Time Net Promoter Score (NPS)

An annual survey is not enough!

- We also ask the same question (How likely are you to recommend PlanSource?) throughout the year at *key moments in the customer experience*

- It's an automated, one-question survey that provides a real-time Net Promoter Score daily, weekly and monthly

- Our customers are scoring us from 1-10 on our software, our services and our people

- Our management team looks at and responds to this feedback on a daily basis
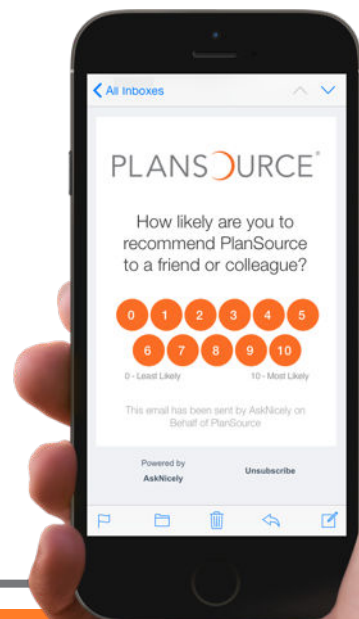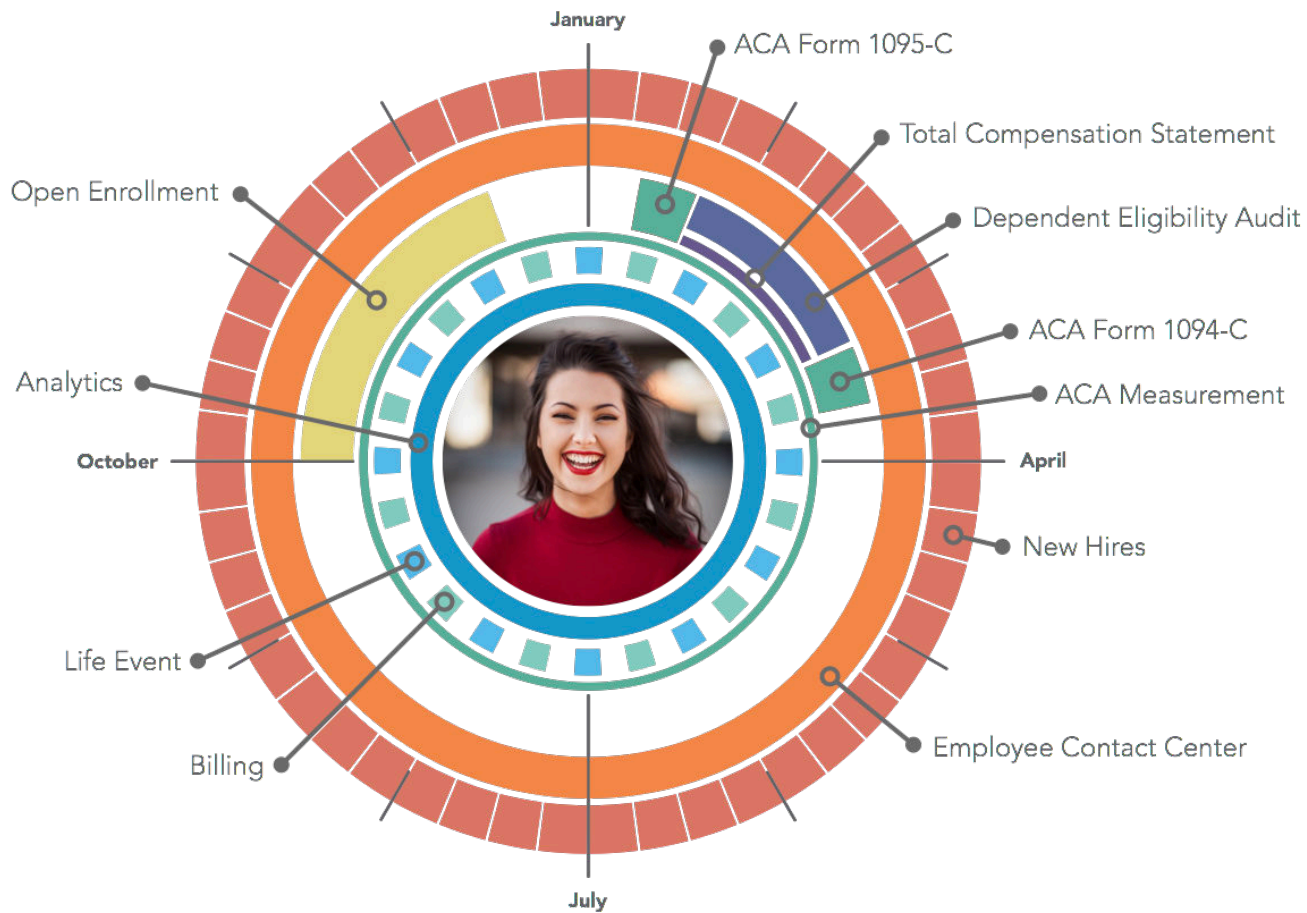
WHY

we do what we do

This is the moment an employee is relying on their employer and their coverage. If they don't have it when they need it – we have failed them.

It's all about the employee.

Happy, engaged employees are a must-have for creating the best benefits experience for HR teams and their employees.

Low employee turnover
(1.2% monthly for the past 12 months)

And high engagement
(90% engagement compared to U.S. average of 76%*)

*Source: SHRM

When Employees are Happy and Engaged

They are more likely to provide an awesome customer experience

	B*********	B*********	PlanSource
Overall rating	★★★★★ 3.3 stars	★★★★★ 3.7 stars	★★★★★ 4.3 stars
CEO approval rating	**68%**	**81%**	**93%**
% that would recommend to a friend	**59%**	**71%**	**85%**

*Source: Glassdoor Reviews, as of November 2017

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Why HR Teams Choose PlanSource

Deep expertise in benefits technology, with a suite of complementary services

Flexible configurations to support the most complex benefit programs and integrations

A customizable and mobile-friendly shopping and enrollment experience

An engaged and experienced team with low turnover

Built-in tools for self-billing, invoice reconciliation, and ACA compliance

Software + Services = Best Benefits Experience

Product Overview

Employee-Friendly Shopping and Enrollment

HR teams can customize the experience to reflect their brand and culture

Employee
Shopping

Educational
Content

Plan
Recommendations

Employee
Communications

Benefit
Enrollment

Life Event
Changes

Mobile-Friendly
Experience

Defined
Contribution

Mobile-Responsive Employee Experience

Employees want to shop for benefits the same way they shop for anything else

- 100% new design
- Mobile-friendly
- Shopping cart
- Checkout process
- More visual presentation

Two Types of Decision Support
We provide as much or as little help as employees need

Educational Tools

PlanSource helps consumers understand the benefits that are offered to them with personalized educational content.

What is an HDHP?

Plan Recommendations

PlanSource helps consumers make the right choices with personalized plan, coverage and contribution amount recommendations.

Plan A   Plan B   Plan C

Which plan is right for me?

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Software + Services = Best Benefits Experience

Employee Experience Demonstration

Sophisticated Benefits Admin and Compliance

Automate your business rules and processes

ACA Compliance

Eligibility Management

Open Enrollment

Cost Calculations

Communications

Billing Reconciliation

Reporting

Document Management

Use "Populations" to Define Your Rules

Create populations that represent your workforce

Plan eligibility

Plan costs

New hire rules

Employee communications

Messaging and page content

HR Administrator access

Billing groups

Reporting

Hourly

Salaried

Full-Time

Part-Time

Location A

Location B

Office

Foreman

Union

Non-Union

Benefit Configuration Examples
Configuration, not customization

☑ Coverage level/dependent rules (including matching across benefits)

☑ Guaranteed issue and Evidence of Insurability

☑ Age-based rates

☑ Coverage amount max based on amount elected for another benefit

☑ Age-reduction schedules
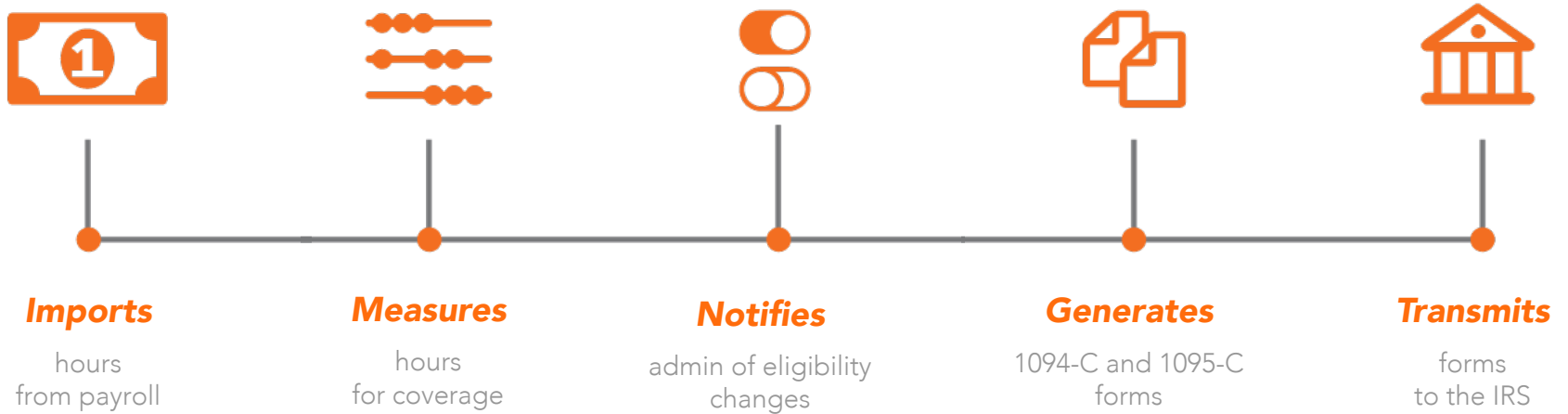
☑ Documentation requirements

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Automated Process Examples

Configuration, not customization

- ☑ Automated enrollment for new hires

- ☑ Terminate coverages due to loss of eligibility

- ☑ Terminate coverages for overage dependents

- ☑ Expire Evidence of Insurability requests

- ☑ Map current year benefits to new year benefits

- ☑ Automated bill generation (preview and final monthly bill)

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Easy ACA Measurement and Reporting
Assemble, preview, approve and transmit 1094-C and 1095-C forms

Imports
hours
from payroll

Measures
hours
for coverage

Notifies
admin of eligibility
changes

Generates
1094-C and 1095-C
forms

Transmits
forms
to the IRS

Simplify Monthly Billing
Self-service billing and reconciliation tools

Configurable Billing Rules

Carrier-Specific Wash Cycle Rules

Display Premiums and Fees

Automated Bill Generation
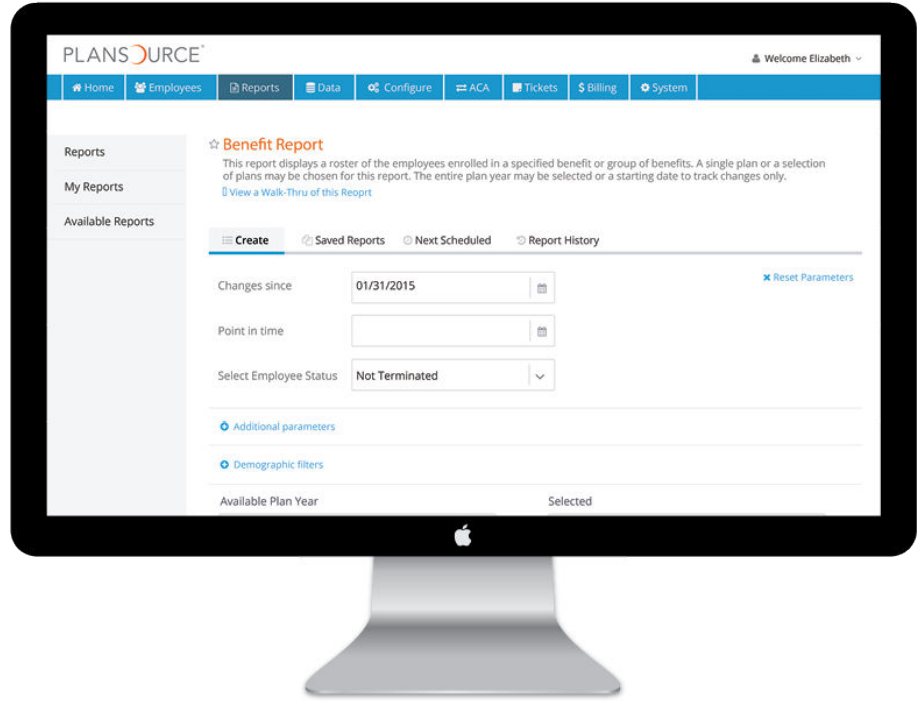
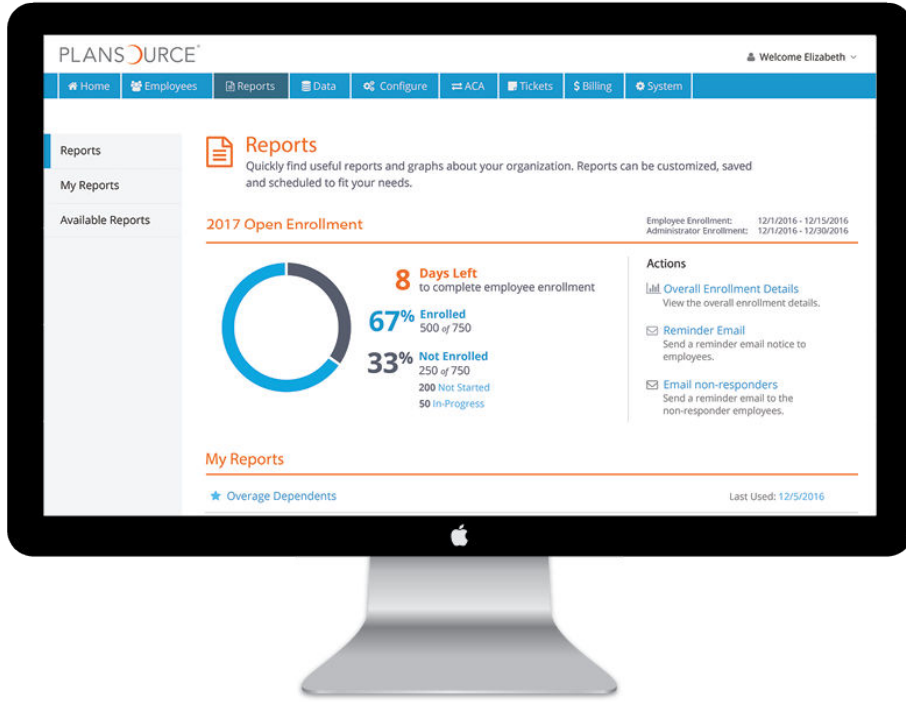Clickable Statements

Multiple Report Options

Self-Bills and Bill Previews

Billing Groups

Flexible Reporting

Create, customize, save and schedule reports and graphs

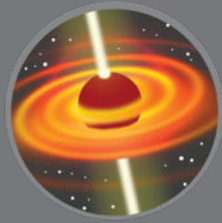# **Software** + Services = Best Benefits Experience

HR Administrator Demonstration

Quarterly Releases

Continuous Investment and Innovation

Halley
September 14
2017

Quasar
December 14
2017

Supernova
March15
2018

Atlas
June 14
2018

Apollo
September 13
2018

Calypso
December 13
2018
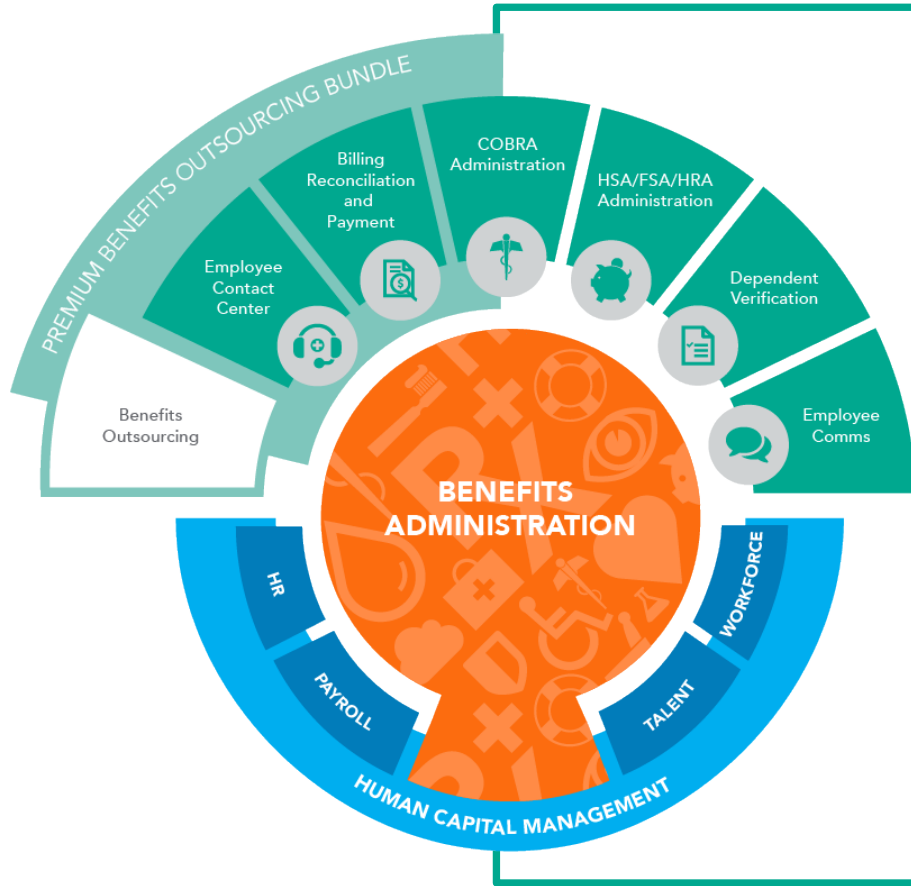
Galileo
March 14
2019

Major releases four times per year with a published release schedule (www.plansource.com/releases)

Transparent release communications, including a web page, webinars,
training videos, and in-system and e-mail notifications

Software + **Services** = Best Benefits Experience

Benefit Services

Flexible Service Offering

Customers can purchase the software plus individual services, or they can purchase the Premium Benefits Outsourcing bundle

Premium Benefits Outsourcing Package

Get the best pricing with the Premium Bundle

System Configuration and Maintenance

New Hire, Life Event and EOI Processing

Data Exchange Operations and Auditing

Eligibility Mgt. and Urgent Coverage Resolution

Billing Reconciliation and Payment Services

COBRA Administration

Branded Employee Contact Center

OE Configuration and Management

PlanSource Premium Benefits Outsourcing
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
- ○ FSA/HSA/HSA administration
- ○ Document verification for newly added dependents

Weekly Processing

- Data exchange oversight
- Evidence of Insurability processing
- HR/Payroll import of demographic changes
- Payroll import of hours (for ACA)
- 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

PlanSource Premium Benefits Outsourcing
You make the decisions, and we manage all the details.

Quarterly Activities

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

Annual Projects

- 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

Monthly Reporting

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

Legend: ● Always Included ○ Add-On Services

Employee Contact Center

Custom toll-free number for a branded employee experience

Password and Login Assistance

"How Do I" Questions

Advocacy and Claims Triage

Phone-Based Enrollment

English and Spanish*

Education and Guidance

How to Get in Touch

✉ By Email

📞 By Phone

💬 By Chat

Benefits Experts at Three Contact Centers
100% of inbound and outbound calls are recorded

Ada, MI

8AM ET to 11PM ET
Mon-Fri

Las Vegas, NV

8AM ET to 11PM ET
Mon-Fri

Salt Lake City, UT

8AM ET to 8PM ET
Mon-Fri

Employee Contact Center – Customer Highlights

800+ customers use the contact center during OE or year-round

Amway GRAND PLAZA	**ALMAC**	**ASPIRA** INC. OF PENNSYLVANIA	**ASHLEY** FURNITURE HomeStore	**CORPORATE RISK HOLDINGS**
1,000 employees	2,000 employees	750 employees	431 employees	2,400 employees
DAYBREAK It's All About A New Beginning	**DEARBORN SCHOOLS**	**EntertainmentPartners** an employee owned company	**EQUINIX**	**FCiFEDERAL**
5,000 employees	2,100 employees	17,000 employees	1,900 employees	3,900 employees
Goodwill Industries of Southeastern Wisconsin, Inc.	THE EVANGELICAL LUTHERAN **Good Samaritan Society** In Christ's Love, Everyone Is Someone.	**GREENLEAF Hospitality** We are more than a career.	**GRPS my choice** Grand Rapids Public Schools	**Health Care District** PALM BEACH COUNTY
2,700 employees	17,000 employees	300 employees	2,350 employees	1,150 employees
LAKE TRAVIS INDEPENDENT SCHOOL DISTRICT Every heart. Every mind. Every day.	**Lam RESEARCH**	**Learning Care group**	**Milton CAT**	**SPIRE HOSPITALITY**
1,450 employees	6,000 employees	18,600 employees	850 employees	2,400 employees

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Billing Reconciliation and Payment Services

What's included in the service?

Multiple Bill Types

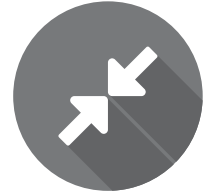Self-bills or list-bills, we've got them covered

Invoice Consolidation

Clients get one bill showing everyone who needs to be paid

Payment Simplification

Employers pay us and we'll pay everyone on your behalf

Discrepancy Resolution

All list bills are audited and any issues with carriers resolved

COBRA Administration Services

How It Works

Send Notices
Generate notices based
upon qualifying events

Process Payment
Process elections and
payments from beneficiaries

Reinstate Coverage
Add COBRA coverage and
manage the eligibility timeline

Bill Enrollees
Bill enrollees and provide
reporting and auditing

Answer questions
Address any questions
with our contact center

Manage OE
Handle open enrollment and
all future notice requirements

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Why COBRA Admin with PlanSource?

A simpler and more efficient process

☑ No one-time setup fees and fewer partners to manage

☑ One database for both active employees and COBRA participants provides one source for reporting and reconciling carrier invoices

☑ Less work for you:

- We'll manage COBRA adds, terms and changes throughout the year and during open enrollment

- We'll handle all participant questions and phone calls

- You don't need to provide us with configuration and renewal info

Custom Employee Communications
Tailored to meet the needs of your unique brand and workforce

Communications Plan

Benefit Websites

Benefit Guides

Traditional Print Materials

New Hire Mailings

Custom Videos

Total Compensation Statements

Text Messaging

Printed Total Compensation Statements

Showcase the overall value of your compensation package to your employees

Custom Branding

Customize one of our templates with your look and feel and messaging for different types of employees

Consolidated Data

Incorporate data from multiple corporate systems to present the complete picture to your employees

Statement Creation and Auditing

Generate statement and envelope proofs to ensure proper design and information elements are met

Printing and Fulfillment

Let us handle the printing of your statements as well as mailing to employee homes or company locations

Printed Total Compensation Statements
Multiple templates are available to provide a starting point

Three-Page
Template (with cover)

Two-Page
Template

One-Page
Template

Interactive Online Total Compensation Statements
Integrated within the employee experience | Custom branding and content

Next Steps

Who do I contact for more information?

Your benefit administrator will remain your point of contact throughout the transition to PlanSource.

On January 2, our benefits team will join the PlanSource team in the PlanSource Minneapolis office.

What is the timing of the transition?

We'll work closely with each of you to determine the best timing and plan for transition.