



PLANSOURCE<sup>®</sup>

*One Source. Many Benefits.*

**Polaris Release Summary**  
**August 29, 2019**

*Elite Partner Preview*

**Will the webinar be recorded?**



**Yes!**

We will e-mail you a link. We will post the recording at [www.plansource.com/releases](http://www.plansource.com/releases).

**Will we have access to slides?**



**Yes!**

We will e-mail you a link. We will post the PDF at [www.plansource.com/releases](http://www.plansource.com/releases).



# How to Ask a Question

The screenshot shows the GoToWebinar Control Panel with the following sections:

- Screen Sharing
- Dashboard
- Attendees: 1 out of 1001
- Audio
  - Use:  Telephone,  Mic & Speakers
  - Dial: +1 (415) 655-0059
  - Access Code: 732-878-437
  - Audio PIN: 77
  - If you're already on the call, press #77# now. [Problem dialing in?](#)
- Talking:
  - Webcam
  - Questions (highlighted)
  - Show Answered Questions

Question	Asker

Type answer here

Send Privately | Send To All

- Polls
- Chat
- Test - Witnessing History  
Webinar ID# 154-586-243
- GoToWebinar logo


Type your question into the  
"Questions" panel

# Today's Speakers



**Hanna Jenkins**  
*Assistant Vice President  
of Product*



**Ryan Jepson**  
*Product Manager*



**Nancy Sansom**  
*Chief Commercial  
Officer*



# Polaris Product Release

## September 12, 2019

# Quarterly Releases

*Continuous investment and innovation*

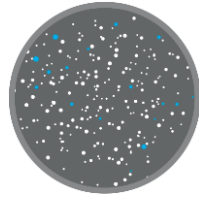
## NEXT RELEASE



**POLARIS**

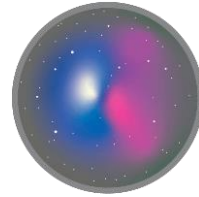
September 12, 2019

## UPCOMING RELEASES



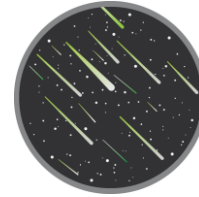
**GEMINI**

December 12, 2019



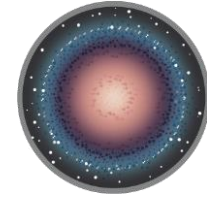
**NEBULA**

March 12, 2020



**PERSEUS**

June 11, 2020



**COSMOS**

Sept. 10, 2020

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



# Agenda

## PlanSource Benefits

New HR Experience

Text Messaging

Jellyvision's ALEX

Mobile App Experience

Employee Experience Updates

New Gender Options

Known Issues Community

Video Library Updates

PlanSource Boost

Eclipse 2019 Recap

## Wrap-Up and Q&A

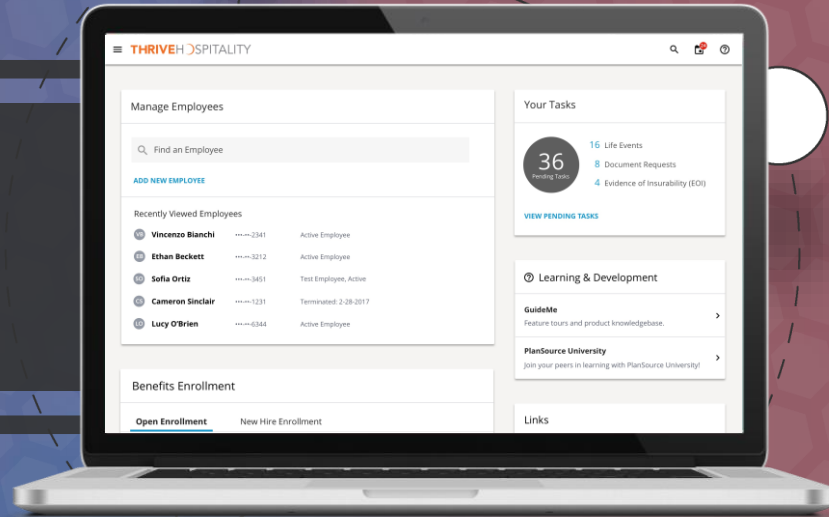


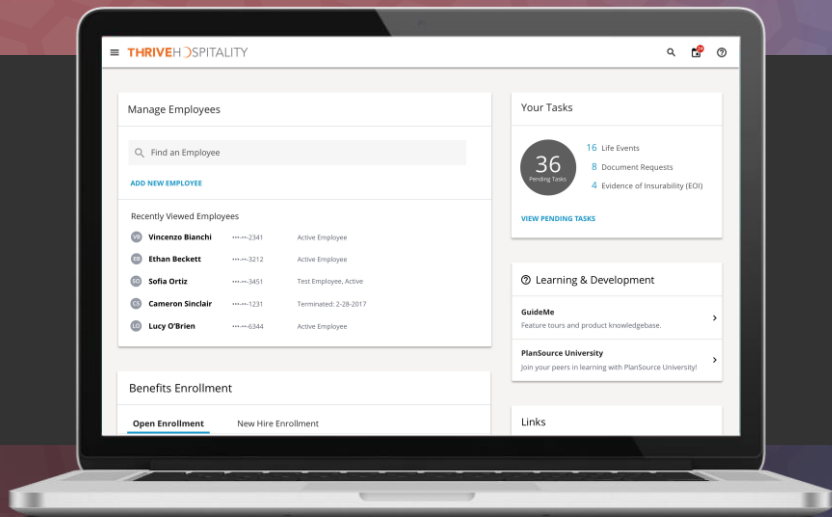
# New HR Experience

*Ryan Jepson*

# New HR Experience

## 18-month investment





# New HR Experience

Mobile-Friendly

Accessible

Thoughtfully redesigned

Now enabled for all customers

## New HR Experience Roll-Out Plan

New HR Experience GA plan is temporarily postponed to allow for a smoother OE season.

The beta toggle will remain for all pages in the New HR Experience through Polaris.

# New HR Experience Stats

*60+% of users are using the New HR Experience*

*5,000+ pieces of feedback have informed our release strategy*

*Only 6% of users report “bugs” as the reason they turned off the New HR Experience (a 25% decrease from June)*



# New HR Experience

Sample of key enhancements for Polaris release

Goal: bring pages to General Availability readiness



## Dashboard

- ✓ Link to reset all enrollment passwords
- ✓ Destroy renewal option
- ✓ Renewal tile update to show details when wizard or SSR are not in use



## Employee Profile

- ✓ Reinstate benefits
- ✓ Notification history link added
- ✓ Termination date added
- ✓ Coverage start date added
- ✓ Ability to edit dates when carrier effective date rules are configured



## Navigation/Search

- ✓ Updated links to only show when user has the correct capability/role
- ✓ Click to chat with and w/o Guideme enabled
- ✓ ACA links added
- ✓ Search behavior improved when only one record is found



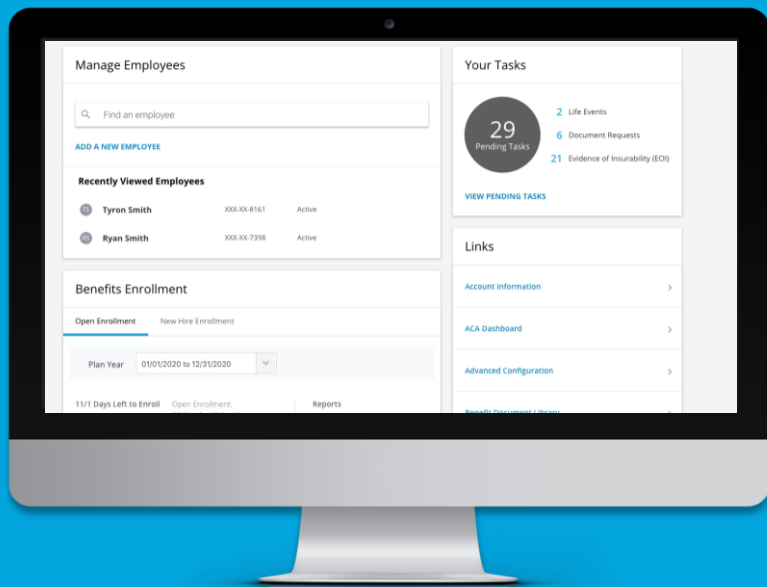
## New Tasks/Work Status Processing Features

- ✓ Life events – edit termination dates
- ✓ Work status processing – search



## Bugs

- ✓ 102 bugs targeted



# HR Experience Demo

# Text Messaging

*Hanna Jenkins*

A close-up photograph of a person's hands typing on a laptop keyboard. The image is partially obscured by a semi-transparent white horizontal banner that spans the width of the frame. The text 'BENEFIT COMMUNICATIONS' is centered on this banner in a bold, teal, sans-serif font. The background shows the laptop keyboard and the person's hands in a shallow depth of field.

# **BENEFIT COMMUNICATIONS**







# Targeted Employee

COMMUNICATIONS

# Targeted Employee COMMUNICATIONS

Campaign  
management

Customizable audience

Tools for testing,  
scheduling and tracking

# Integrated Text Messaging

*Sending text messages is as easy as sending email campaigns*

Rightback Atchison

Home Employees Reports Data Configure ACA Tickets Billing System

Dashboard

Recipient Manager

Manage Campaigns

History

## Create New Campaign

This is where you manage your campaign. Select the recipient list, choose notification type, write your message and save your draft. You can test, schedule/automate and send the messages afterwards.

✓ Campaign was successfully saved.

Utah new hire announcement June 2018

Live In Utah

Select your notification type(s):  Email  SMS

Create a message for each selected notification type:

SMS Preview

Welcome to PlanSource! We are excited to have you join our team.  
Reply STOP to cancel.

Characters: 88/160

Back Save

Schedule/Automate Test Send Now

Send Now



Employees must consent and opt-in to receive text messages



Message and data rates may apply



Employees can text STOP to opt-out anytime



Send email, text or both!



Available within the Employee Communications tool

*Beta Available Now!*

# Combine Email & Text

## *Powerful Employee Engagement*



Emails are great for detailed and official communication, supporting documents and attachments and are a more formal way of communication.



Text messages are great for reminders, access to links or downloads and better access to employees with almost double the open/click rate.

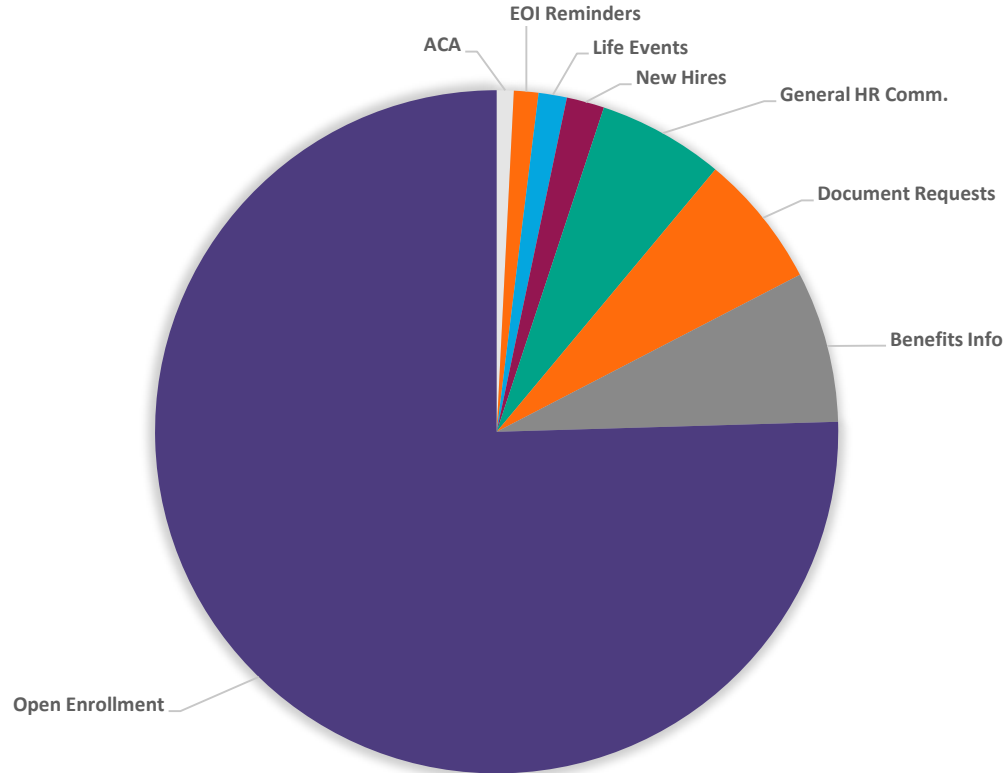


Both modes are complementary to each other and combining both within a single campaign, is a powerful way to capture their attention and increase employee engagement.

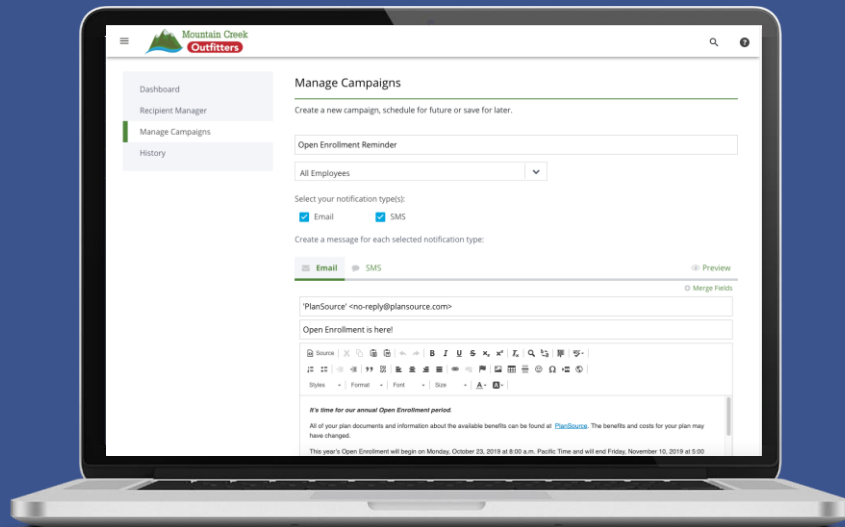
# All-in-one Communication Platform

*75% of communications YTD are related to open enrollment*

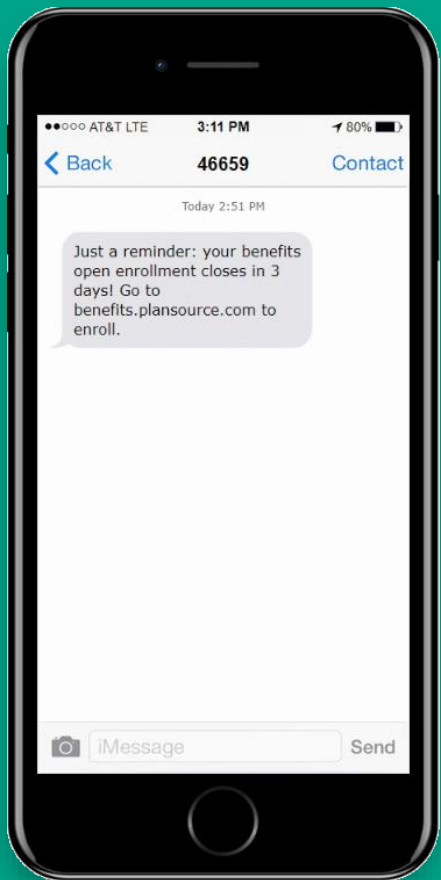
## COMMUNICATIONS USAGE BY TYPE







# Demo



# Text Messaging Beta Available Now!

- **Q3-Q4 2019:** Beta Program  
**Promotional beta pricing available**
- **2020:** General Availability
- PEPM based pricing will be announced in September
- Contact your Sales rep or Account Manager for interest in beta program.
- PSU training guides are available along with a communications best practices guide

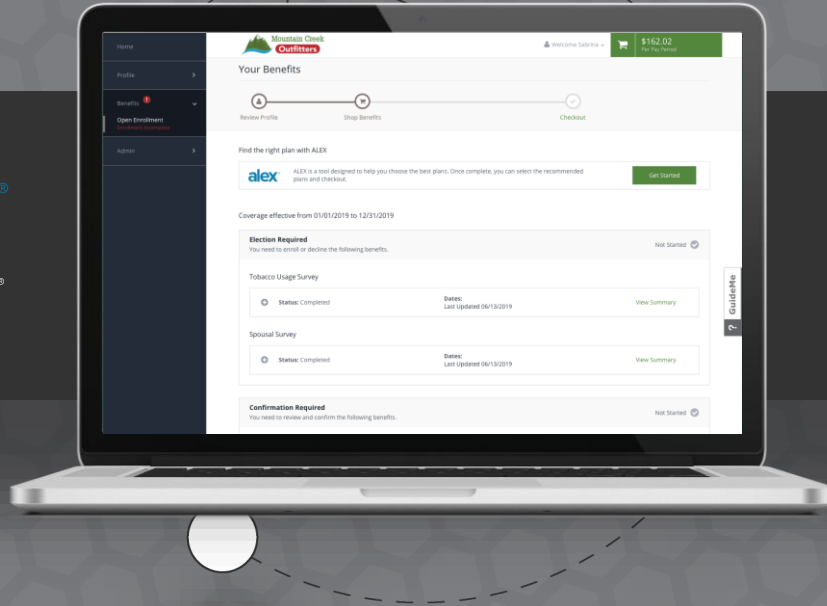
# Jellyvision Integration

*Hanna Jenkins*



alex<sup>®</sup>

alex<sup>®</sup>  
PLANSOURCE<sup>®</sup>



Better  
Together



Home

Profile >

Benefits ! ▾

**New Hire Benefits**  
Enrollment Incomplete



Welcome Samantha ▾



\$0.00  
Per Pay Period

## Current Benefit Elections



Review Profile



Shop Benefits



Checkout

Find the right plan with ALEX



ALEX is a tool designed to help you choose the best plans. Once complete, you can select the recommended plans and checkout.

Get Started

**Current Benefits** Coverage effective from 01/01/2019 to 12/31/2019

Medical




No Plan Selected

Shop Plans

### Current Benefit Elections

**Choose Plans With ALEX** ✕



If you are done using ALEX please click Update Plan Selections to review all of your plan selections.

You will be able to view your recommendations and shop for plans.

**Please make sure pop-up filters are disabled.** If ALEX does not open in a new window please check your pop-up filter settings and try again.

[Update Plan Selections](#)

 Review Profile

 Checkout

Find the right



[Get Started](#)

Current

Medical



No Plan Selected

[Shop Plans](#)

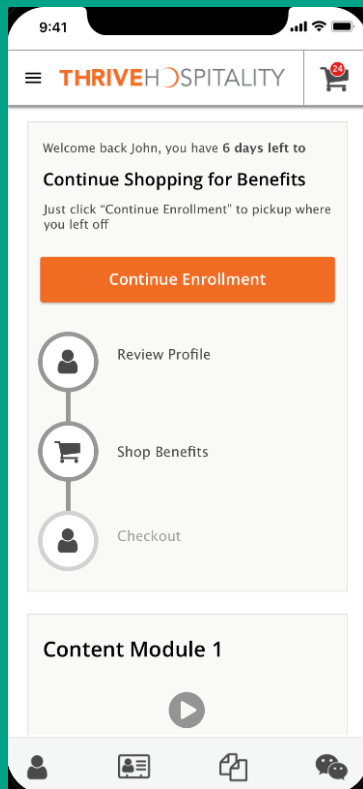
# Jellyvision Beta Program – Available Now

*PlanSource and ALEX – better together*

- The Jellyvision- PlanSource integration is available now - for all group sizes!
- Currently we have 20+ customers signed up
- There is an implementation timeline of 6-8 weeks to launch
- If interested in the beta program, please reach out to your PlanSource contact or Account Manager
- Note:
  - The ALEX integration provided by Jellyvision is an add-on; customers will need to purchase and contract directly with Jellyvision in order to take advantage of the integration within PlanSource
  - Additional restrictions may apply, please contact PlanSource for more details
  - Jellyvision ALEX DIY (self-implemented) is not available at this time

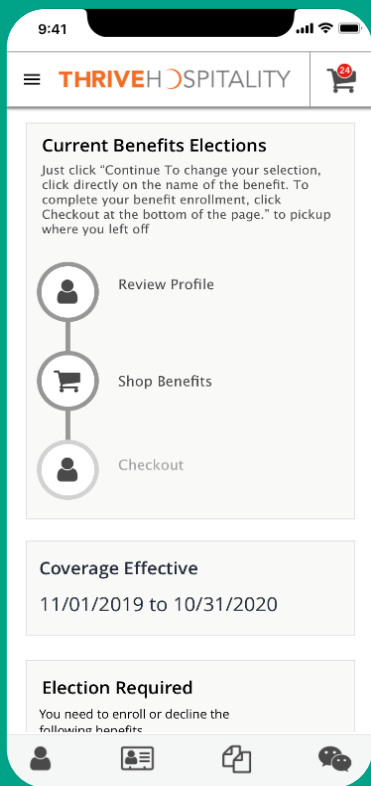
# Mobile App Experience

*Coming Soon!*



New mobile app experience with  
mobile enrollment!

**\*Coming Soon!**



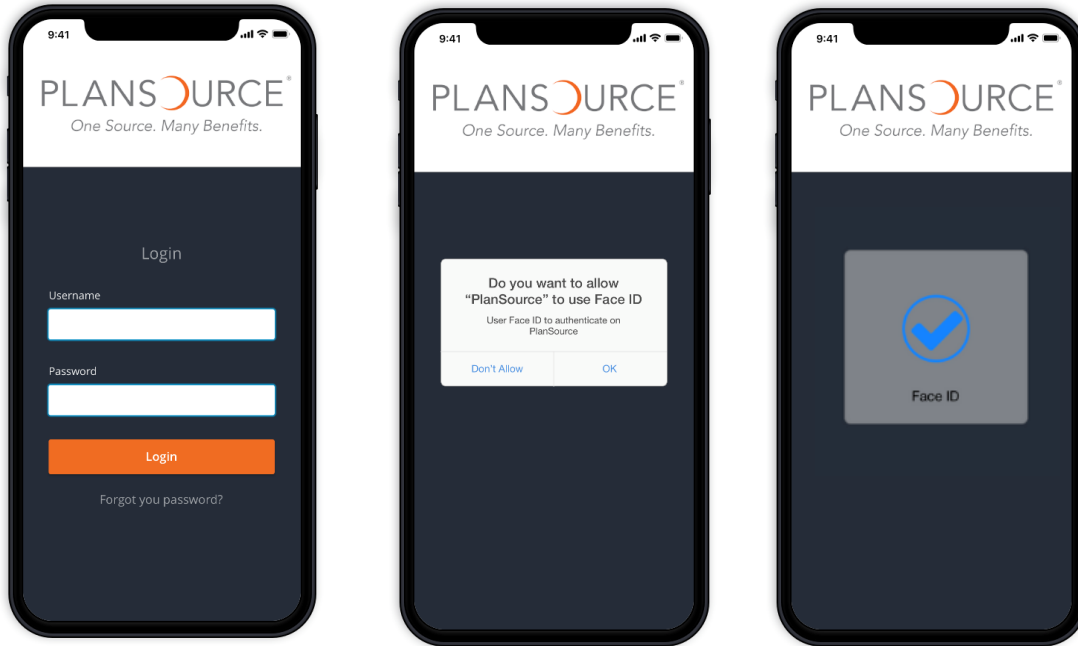
Access our advanced mobile-responsive employee experience from within the PlanSource Mobile App

Blended mobile app and enrollment menus for a cohesive experience:

- **My Profile**
- **My Contacts**
- **My Documents**
- **Live Chat**

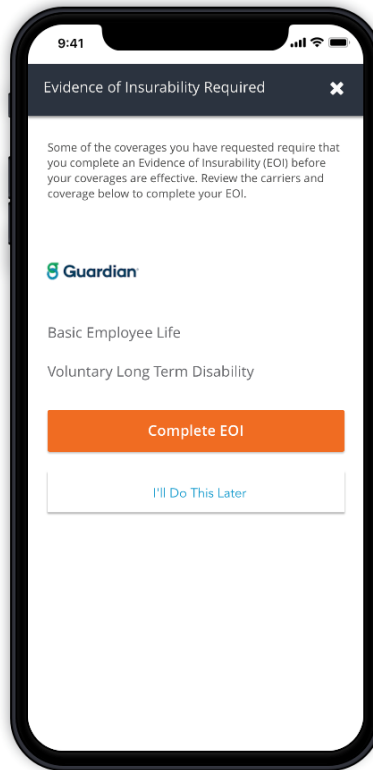
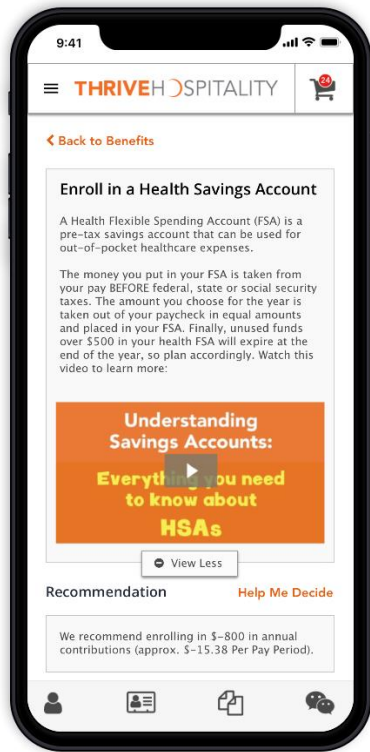
# Upgraded Mobile Application Authentication Methods

*Facial Recognition, Fingerprint, Four-digit passcode, QR Code*





# Seamless Employee Experience – Never Leave the App



Compatible with external  
links and integrations

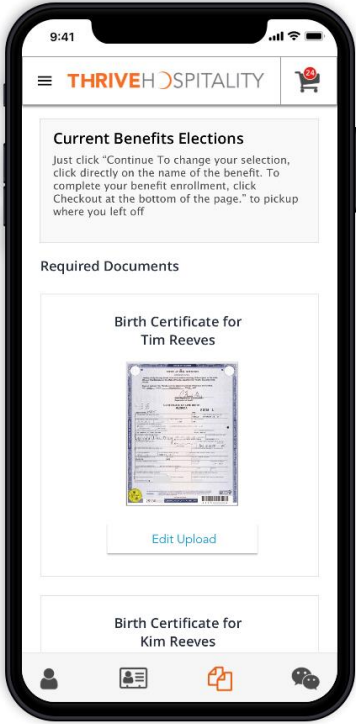
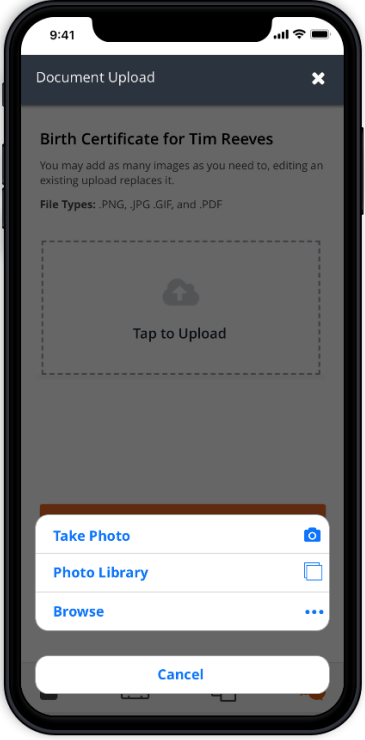
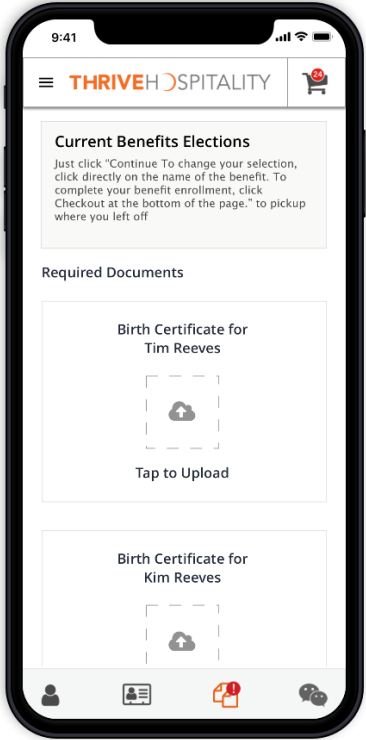
Plan Content Links

Decision Support

Jellyvision's ALEX

EOI Completion

# Fast and Efficient Document Upload



# Employee Experience Updates

Home

Profile

Benefits

Documents

THRIVEHOSPITALITY

Welcome John

\$228.76  
Cost per pay period

Welcome John,

**Do You Need to Update Your Benefits?**

Click below if you've had a qualifying life event, such as getting married or an addition to the family.

[Update My Benefits](#)

Or you can [review your current benefits](#).

Your To-Do List 2 of 5 Complete

- Make the most of your benefits, find a doctor near you
- Make the most of your benefits - find an Eye Doctor
- Register for Guardian Anytime to access your Dental claims and ID cards
- Complete your application for Guardian benefits
- Upload a document

**MetLife**  
Core Plus Medical Plan  
[View Plan Details](#)

[Visit MetLife.com](#)

Access information about your medical benefits.

**Alegeus**  
Health Savings Account (HSA)  
[View Plan Details](#)

[Register your HSA Account](#)

Note: Your HSA will not receive contributions until registration is complete.

**Guardian**

Dental Premier [View Plan Details](#)

- [View My Providers](#)
- [View Recent Claims](#)
- [Get ID Cards](#)

Vision Select [View Plan Details](#)

- [View My Providers](#)
- [View Recent Claims](#)
- [Get ID Cards](#)

**Learn about the 1095-C**  
Watch this video to learn about the new IRS Form 1095-C that includes the health care coverage offered to you by your employer.

**Learn About Benefits**  
Watch these short, entertaining videos to learn benefits terminology, how plans work and what they mean for you.

**Download the PlanSource App**  
With the Apple or Android App, you have on-the-go access to your benefits and important notifications from your employer.

## New Employee To-do List

*Help employees stay organized and focused on required action items*

- Newly located on the employee dashboard
- EOI reminders - supports documents & integrations
- Integrated with document library

THRIVE HOSPITALITY

Welcome John \$123.45 per pay period

[Edit Info](#)

Basic Information	
First Name*	SSN
John	999-12-3456
Middle Name	Gender*
Matthew	Male
Last Name*	Birthdate*
Smith	09/26/1982
Relationship*	
Spouse	

Additional Information	
Lives at Home	QMCSO
Yes	Yes
Verified	Incorrect SSN
No	No

[← Back](#) [Next: Shop for Benefits](#)

- New UI updates to the "My Profile" and "My Family" pages
- Groups information into more easily reviewable blocks

# Reminder: Support for 2.0 version expires in September 2019

- This means we will no longer provide product or technical support for the 2.0 version of the employee experience.
- New features, enhancements and bug fixes will only be addressed in the 3.0 version.
- If a client encounters issues with the legacy enrollment system, the recommended course of action is to migrate to 3.0.

## WHY MAKE THE SWITCH?

Visually engaging | Faster overall experience

Accessible and mobile-friendly | Familiar shopping cart experience

| Guided workflows | Access to new integrations

# Leading Integrations

*Employee benefits experience*



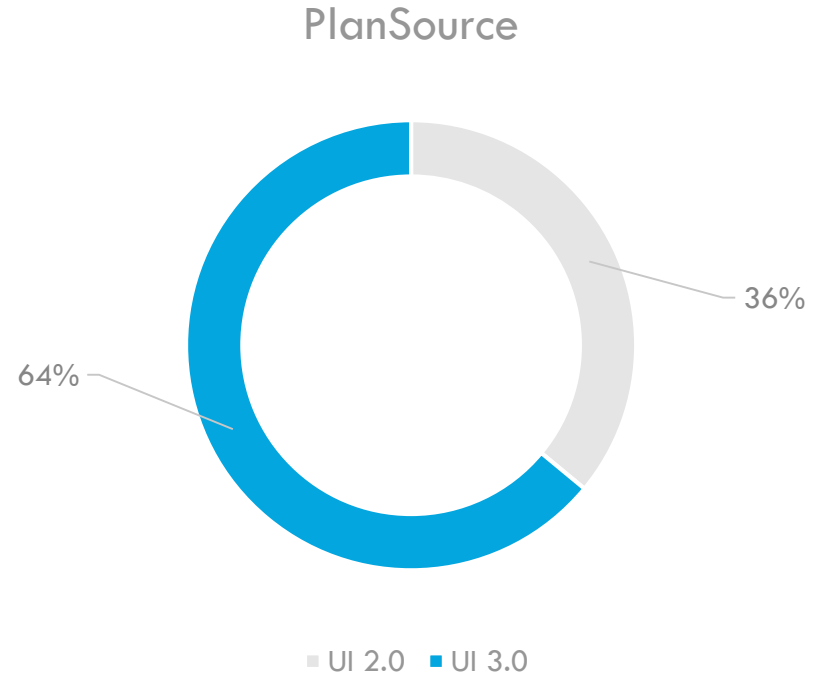


# Migration by the Numbers

## *Employee Experience*

### Supporting documentation to make the switch:

- PlanSource University course
- GuideMe content



## New Gender Options

# New Gender Options

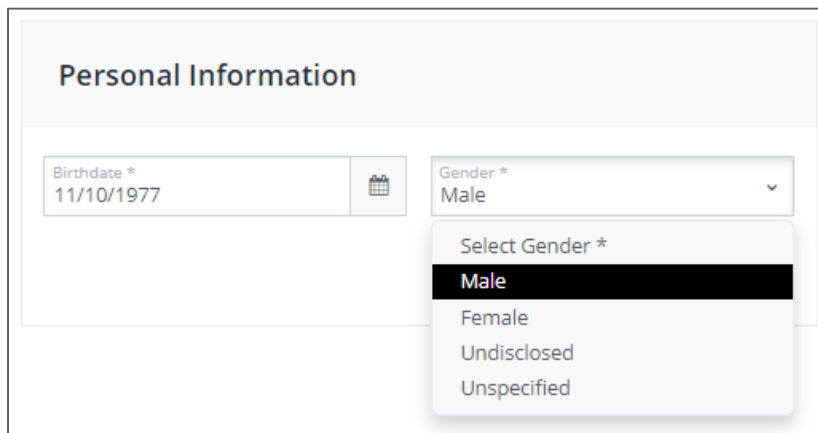
*To accommodate 'Gender-Nonbinary' individuals*

California and New York City have specific protections that prohibit discrimination against gender-nonbinary individuals, increasing HR Compliance requirements encompassing HR technology.

In Q3 we will be releasing a closed beta program to support these needs.

Enrollment into the beta program will trigger a switch from Male (M) and Female (F) gender options to an updated selection that includes Undisclosed (U) or Unspecified (X) gender values.

Additionally, employees and their administrators will have the ability to modify dependent gender directly through the user interface.



The screenshot displays a 'Personal Information' form section. On the left, there is a 'Birthdate \*' field containing '11/10/1977' and a calendar icon. To the right is a 'Gender \*' dropdown menu. The dropdown is open, showing a list of options: 'Male' (highlighted with a black background), 'Female', 'Undisclosed', and 'Unspecified'. The text 'Select Gender \*' is visible above the list.

# Future Enhancements

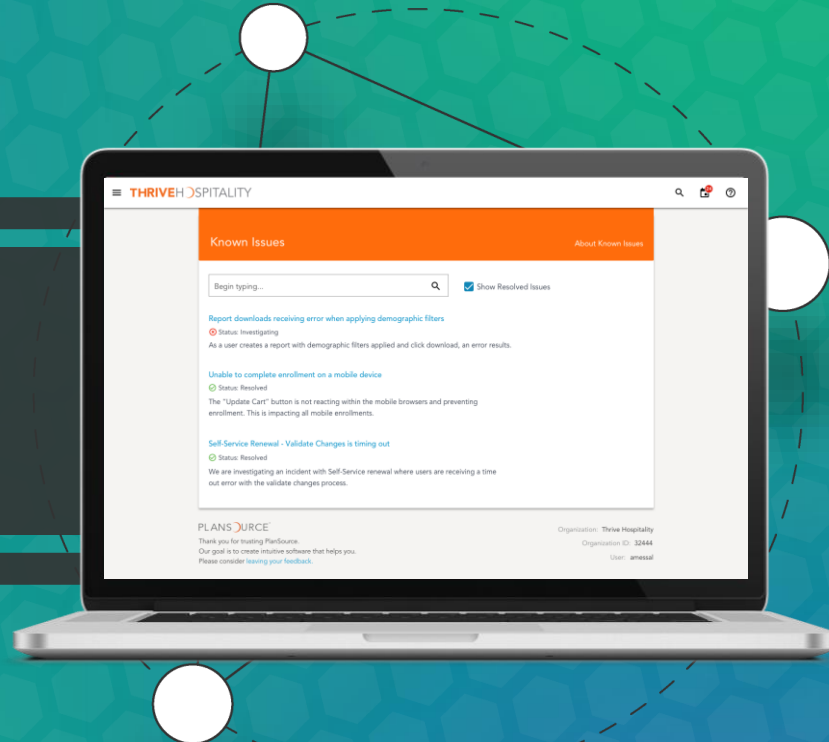
*To accommodate 'Gender-Nonbinary' Individuals*

- We will be expanding Beta functionality in Q4 2019 to support additional data transaction formats.
- Note: Upon general availability of this initiative, employees and/or dependents with undisclosed (U) or unspecified genders (X) may not be supported by carriers and will need manual intervention to ensure proper coverage is received, maintained, and/or terminated.

# Known Issues Community

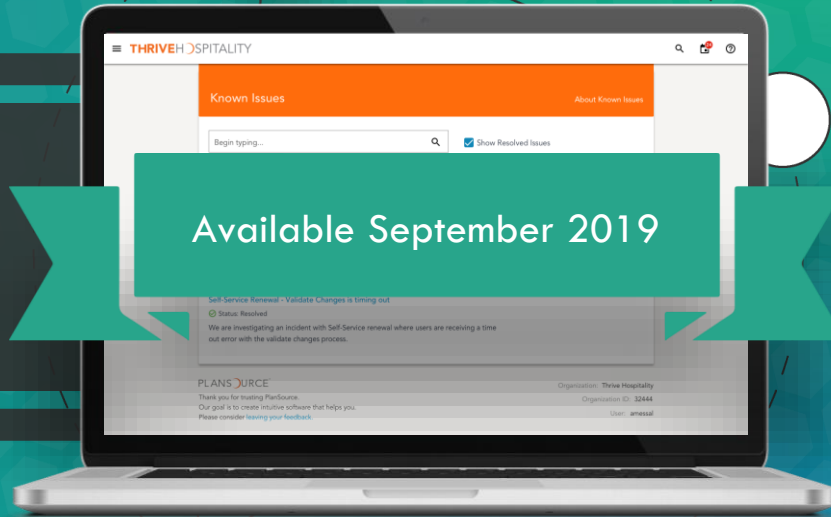
*PlanSource Community Update*

# New Release Communication Tools



# New Release Communication Tools

Available September 2019



# New PSU Community: Known Issues

Available September 13, 2019

PLANSOURCE®

[Home](#)

[Courses](#)

[Library](#)

[Webinars](#)

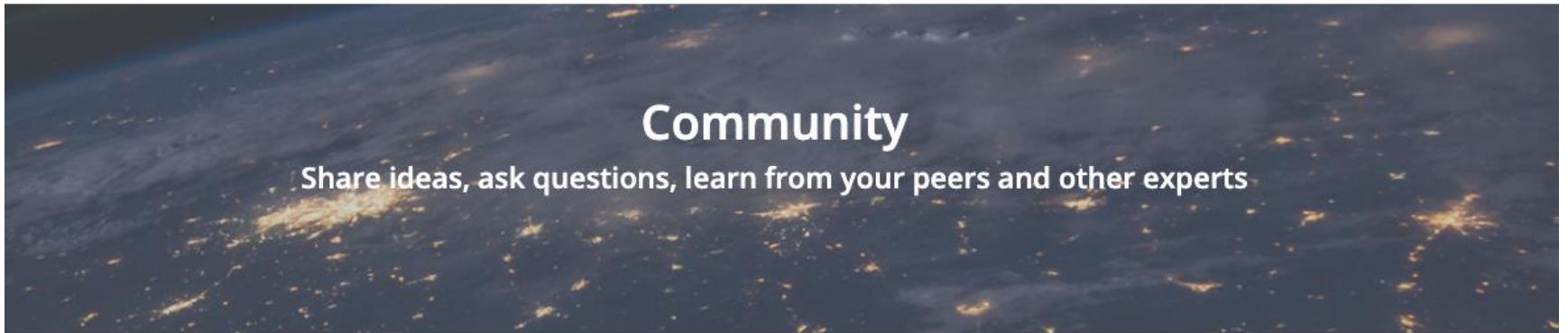
[Dashboard](#)

[Community](#)



Hey, PSU Guest! ▾

[Home](#) / [Communities](#)



## Community

Share ideas, ask questions, learn from your peers and other experts

[Community Guidelines](#)



### Known Issues

View and follow communications from PlanSource regarding system issues and outages.

[View All/Post](#)



# Multi-Factor Authentication

*4 different ways to authenticate*

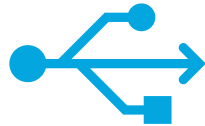
Update: There will be no cost associated with SMS Multi-Factor authentication for Admins or Employees

SMS



Receive a code sent via text message.

YubiKey



Hardware token plugged into a USB drive.

Authenticator App



Generate codes from a smartphone app

Backup Codes



Printable list of codes as a backup plan.

# PlanSource Video Library

# Educational Video Library Updates

*Available with the September Polaris release*

## New Videos

What is an Employee Assistance Program?

Know Where to Go (Telehealth)

What are Beneficiaries?

What is Vision Insurance?

Commuter Benefits



# Importance of Mental Health

*New video about Employee Assistance Programs*

Understanding Benefits:

What is an Employee Assistance Program?

W O R K      L I F E



W O R K



EAP  
100%  
covered

W O R K      L I F E



W O R K      L I F E



EAP



W O R K      L I F E



EAP



# Importance of Managing Cost of Care

*New video about knowing where to go – telehealth vs. urgent care vs. ER*

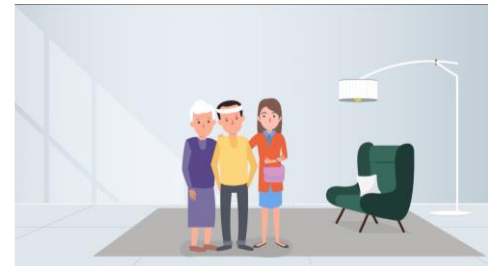
## Three options

1 2 3



**Cost Effective**

**Minor Health Issues**



## Advantages



**“Mild to moderate”**



**Partially covered**



**“Understand your health care options”**



**“Know before you go”**



# Educational Video Library Updates

*Available with the September Polaris release*

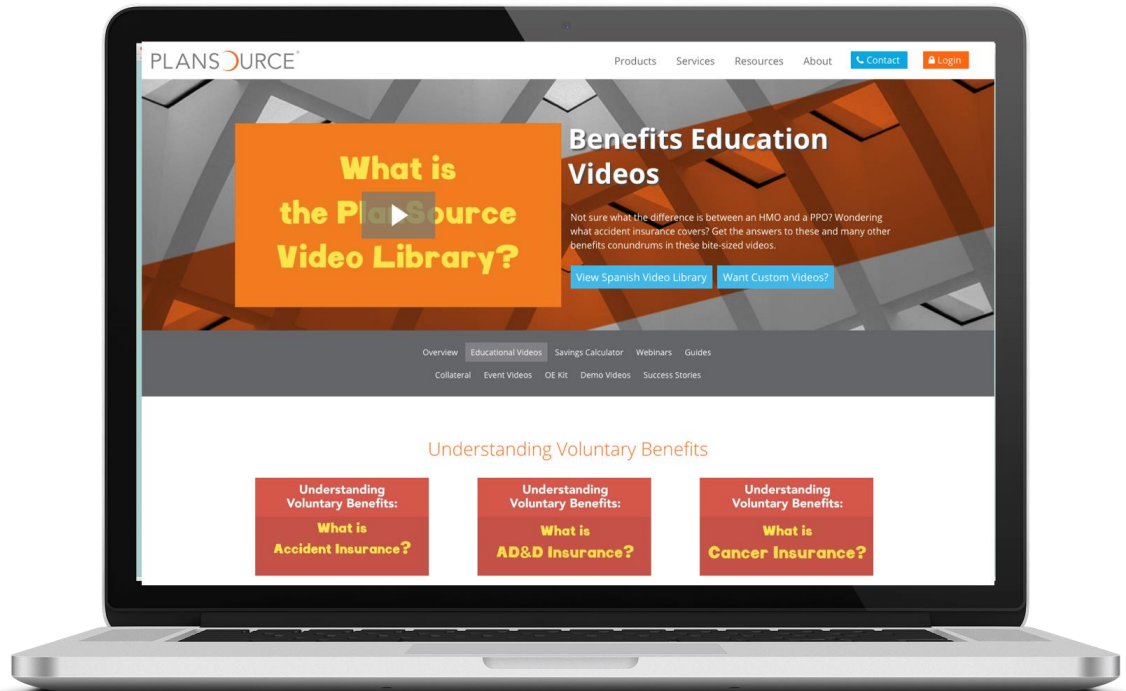
## Updated Videos

What is Life Insurance?

What is Cancer Insurance?

Healthcare FSA

Dependent Care FSA



# PlanSource Boost

*PlanSource announced its new Boost program at Eclipse*

# Sunsetting The PlanSource Advantage Program

*PlanSource is phasing out its carrier credits program at year-end and replacing it with Boost*









## Featured Carriers

The Aflac logo features the word "Aflac" in a blue, sans-serif font. A small, stylized orange duck head is positioned to the right of the letter "l".The Cigna logo consists of a stylized green tree with a human figure in the center, where the arms and legs of the figure form the trunk and branches. Below the tree is the word "Cigna" in a blue, sans-serif font.The Guardian logo features a green stylized "G" symbol followed by the word "Guardian" in a blue, sans-serif font.The MetLife logo includes a blue and green stylized "M" symbol followed by the word "MetLife" in a blue, sans-serif font.The unum logo features the word "unum" in a blue, sans-serif font, with three blue circles above the letters "u", "n", and "m".The Allstate BENEFITS logo shows a blue circular icon with a white figure inside, followed by the word "Allstate" in a blue, sans-serif font and "BENEFITS" in a smaller, blue, sans-serif font below it.The Colonial Life logo features the word "Colonial Life" in a blue, sans-serif font, with a small green tree icon above the word "Life". Below it is the tagline "Making benefits count." in a smaller, blue, sans-serif font.The Lincoln Financial Group logo includes a red stylized "L" icon followed by the word "Lincoln" in a red, serif font and "Financial Group" in a smaller, blue, sans-serif font below it.The Mutual of Omaha logo features a blue circular icon with a white owl inside, followed by the words "Mutual of Omaha" in a blue, serif font.The Prudential logo shows a blue circular icon with a white figure inside, followed by the word "Prudential" in a blue, serif font.The Sun Life Financial logo features a yellow sun icon with rays, followed by the words "Sun Life Financial" in a blue, sans-serif font.The Standard logo includes a blue stylized "S" icon followed by the word "TheStandard" in a blue, sans-serif font.The VOYA FINANCIAL logo features the word "VOYA" in a large, orange, sans-serif font, with "FINANCIAL" in a smaller, blue, sans-serif font below it.



# Why Sunset PlanSource Advantage?

*Unique carrier arrangements are complex to explain and administer*

		Enrolled Employees		Per Employee Credit		Monthly Credit Amount
	Dental	800	X	\$1.35	=	\$1,080.00
	Vision	500	X	\$0.25	=	\$125.00
	Basic Life	1,000	X	\$0.25	=	\$250.00
	Disability	350	X	\$0.25	=	\$87.50
	Hospital Indemnity	100	X	\$1.00	=	\$100.00
	Accident	100	X	\$1.00	=	\$100.00
	Critical Illness	80	X	\$1.00	=	\$80.00
<b>Total Monthly Savings</b>						<b>\$1,822.50</b> 
<b>Total Per Employee Per Month Savings</b>						<b>\$1.82</b>

Credits no longer available *to new customers* after 12/31/2019.

Carrier credits for existing customers will be grandfathered, although existing customers can move to Boost at renewal in Q2 of 2020.

# PLANSOURCE<sup>®</sup> | BOOST

The goal of PlanSource Boost is to improve the customer experience by partnering with leading insurance carriers to create new integrations and services.

This strategy will lead to a more modern, convenient and familiar engagement for clients all while reducing costs, driving growth and increasing customer retention.

## Boost Solves Critical Pain Points:

1. Redundant, cumbersome setup process
2. Batch EDI files create timing and coverage problems
3. Employees need one place to access carrier portals and provider directories
4. The monthly billing process is tedious and time consuming for customers
5. EOI risk is high, and the process is often manual for employees and HR teams
6. Companies should focus on buying the right benefits for their employees rather than which carrier can provide the most credits

# PLANSOURCE<sup>®</sup> | BOOST



**Modern, real-time**  
API integrations with  
leading insurance carriers



**Optimized**  
employee shopping  
experience that drives  
engagement



**Simple pre-discounted**  
price when customers use  
one or more Boost partners



**Simplified Billing Process**  
where PlanSource invoices and  
remits payment to the carrier

# PLANSOURCE<sup>®</sup> | BOOST

*A suite of API-based integrations to modernize the customer experience*

## **Configuration API**

automates the setup and renewal process, eliminating errors

## **EOI Integration**

For seamless shopping and automated decision notification

## **Enrollment API**

eliminates batch EDI files and related timing issues

## **Member Portal**

access and provider directory integration from PlanSource

# PLANSOURCE® | BOOST

*Guardian is available 9/1 and we have verbal commitments from these carriers*





*Available 9/1/2019*

*Guardian is no longer offering a credit program as of 9/1/2019*



PlanSource Boost with Guardian – available 9/1/2019

Companies with 1 or more lines of business with Guardian will qualify for special Boost pricing. Contact a salesperson for specifics on pricing.

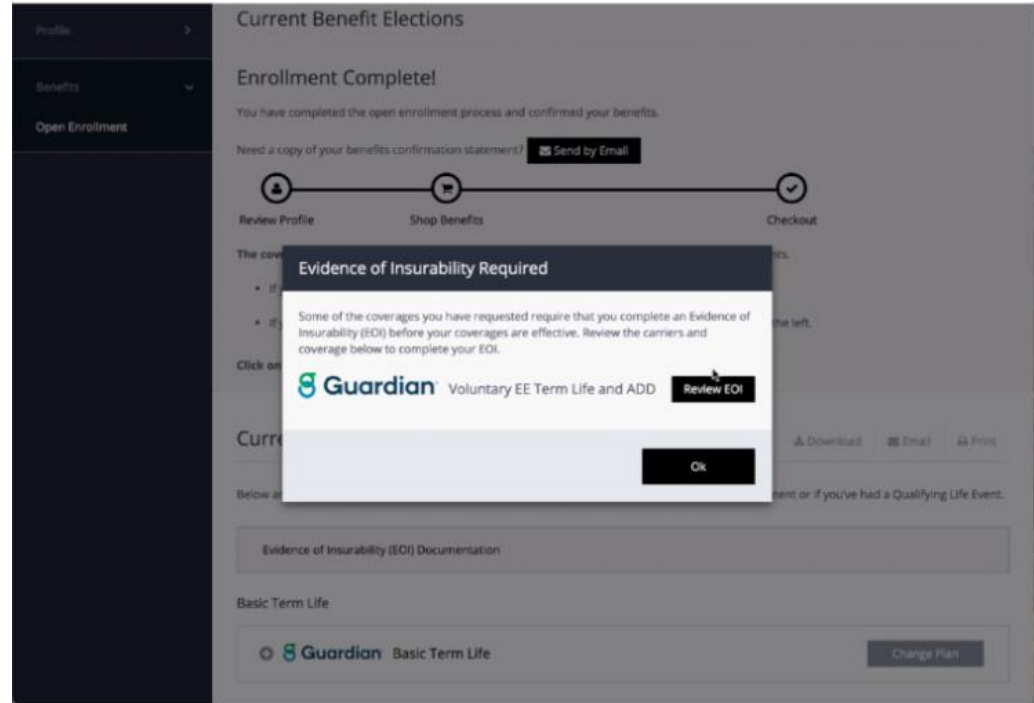
# Evidence of Insurability Integration – Available Now

*Single Sign-on to Guardian's EOI form and automatic decision notification*

## EOI Integration

Allows employees to answer EOI questions within the benefits shopping experience. The decision from the carrier comes back to PlanSource automatically (nightly) notifying the HR admin and employee.

*V3 of EOI – including real-time decision notification and mobile-friendly access coming Sept. 2020*



# Plan Configuration API – Dental – Available Sep 2019

Setup process goes from weeks to minutes!

## Plan Configuration API

Automates setup by pulling product and rate information for Dental from Guardian's system. Eliminating customer effort and reducing errors and time to implement.

Dental Available - September 2019

All other products will be available – March 2020

THRIVEOSPIRALITY

☑ Add Integration

☑ Plans

☑ Employee Groups

☑ Review & Submit

### Guardian Add Integration

Please enter your Group ID to create the connection to Guardian.

Guardian Group ID

This may also be your Group Number. Ex 00123456

< Back   Next >



Communicates all rates, eligibility rules, effective dates, etc. automatically

THRIVEOSPIRALITY

### Integrations

PLAN YEAR: 01/01/2020 TO 12/31/2020

Connect to a provider's data source, eliminating errors and reducing your time to renew.

All Complete   Save and Return Later

Benefit	Plan	Guardian Value	Employee Groups
☑ Dental	Dental PPO	Class 1	All Employees
☑ Dental	Dental DHMO	Class 2	Part-Time Employees

Guardian CONNECTED   Edit

# Plan Configuration in Guided Renewal Workflow

## Integrations PLAN YEAR: 01/01/2020 TO 12/31/2020

Connect to a provider's data source, eliminating errors and reducing your time to renew.

All Complete

Save and Return Later

⊕ Guardian

**Guardian** AVAILABLE

Add Integration

# Plan Configuration in Guided Renewal Workflow

✓ Add Integration

✓ Plans

✓ Employee Groups

✓ Review & Submit

## Guardian Add Integration

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◀ Back

Next ▶

- ✔ Add Integration
- ✔ Plans
- ✔ Employee Groups
- ✔ Review & Submit

## Guardian Plans

✔ Success! You are now connected to Guardian.

Organization: **Thrive Hospitality**

Benefit	Plan	Coverage Tier
Dental	Dental PPO	4 Coverage Tiers
Dental	Dental DHMO	Employee Only

[← Back](#)

[Next →](#)

- ✓ Add Integration
- ✓ Plans
- ✓ Employee Groups
- ✓ Review & Submit

## Guardian Employee Groups

Next, match Eligible Employee Groups

Benefit	Plan	Guardian Value	Employee Groups
Dental	Dental PPO	Class 1	All Employees <input type="button" value="v"/>
Dental	Dental DHMO	Class 2	Part-Time Employees <input type="button" value="v"/>

# Integrations PLAN YEAR: 01/01/2020 TO 12/31/2020

Connect to a provider's data source, eliminating errors and reducing your time to renew.

All Complete

Save and Return Later

✔ Guardian

**Guardian** CONNECTED [Edit](#)

Benefit	Plan	Guardian Value	Employee Groups
✔ Dental	Dental PPO	Class 1	All Employees
✔ Dental	Dental DHMO	Class 2	Part-Time Employees



# Eclipse Recap

*Highlights from the Benefits Event of the year*

# PlanSource Eclipse 2019

Watch the keynote at [plansource.com/keynote](https://plansource.com/keynote)



# PlanSource Eclipse'19

See highlights (videos, presentations, handouts) at [eclipse.plansource.com](https://eclipse.plansource.com)





— PLANSOURCE —  
ECLIPSE

**MAY 5 - MAY 7  
2020**

The Ritz-Carlton,  
Laguna Niguel



# Q&A