



PLANSOURCE[®]

One Source. Many Benefits.

Polaris Release Summary
September 5, 2019

General Preview

Will the webinar be recorded?



Yes!

We will e-mail you a link. We will post the recording at www.plansource.com/releases.

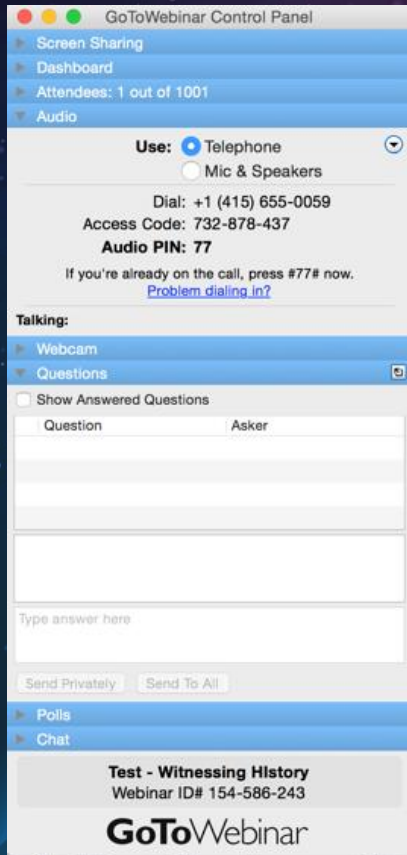
Will we have access to slides?



Yes!

We will e-mail you a link. We will post the PDF at www.plansource.com/releases.

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



Polaris Product Release

September 12, 2019

Quarterly Releases

Continuous investment and innovation

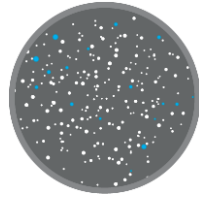
NEXT RELEASE



POLARIS

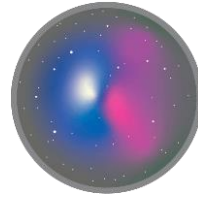
September 12, 2019

UPCOMING RELEASES



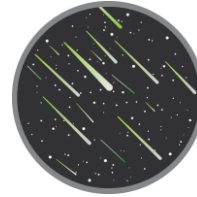
GEMINI

December 12, 2019



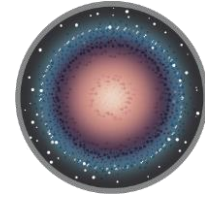
NEBULA

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)



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



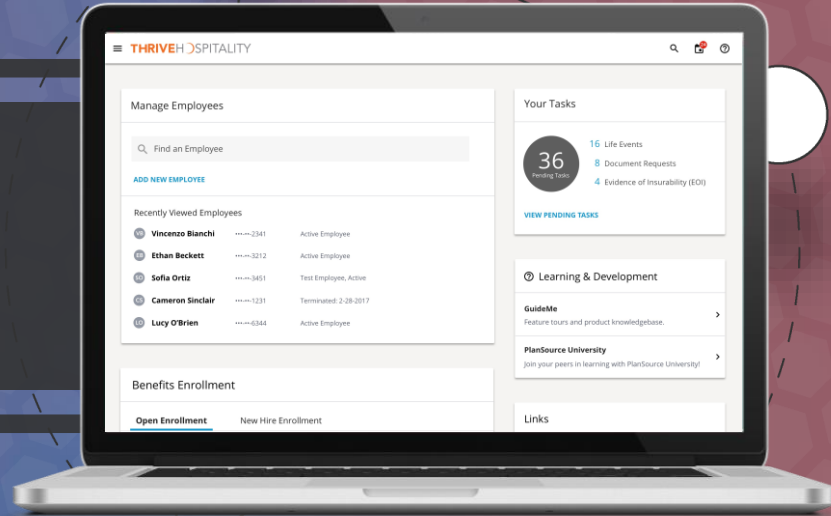
New HR Experience

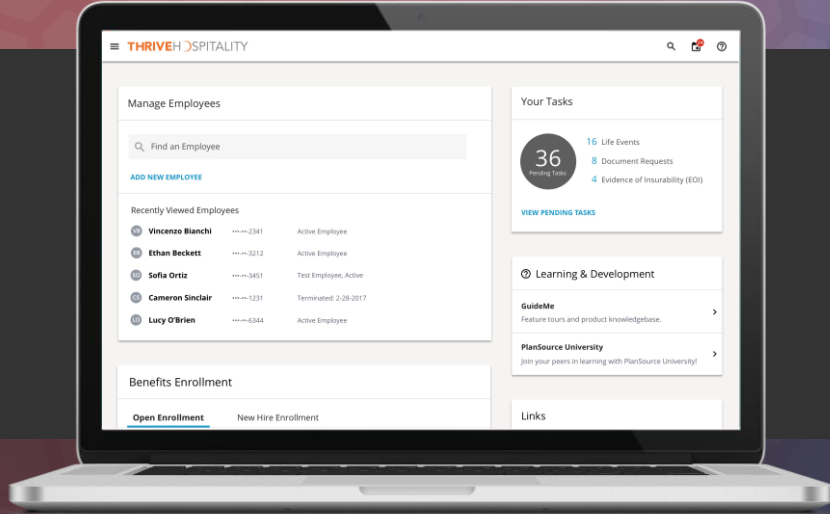
Ryan Jepson



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



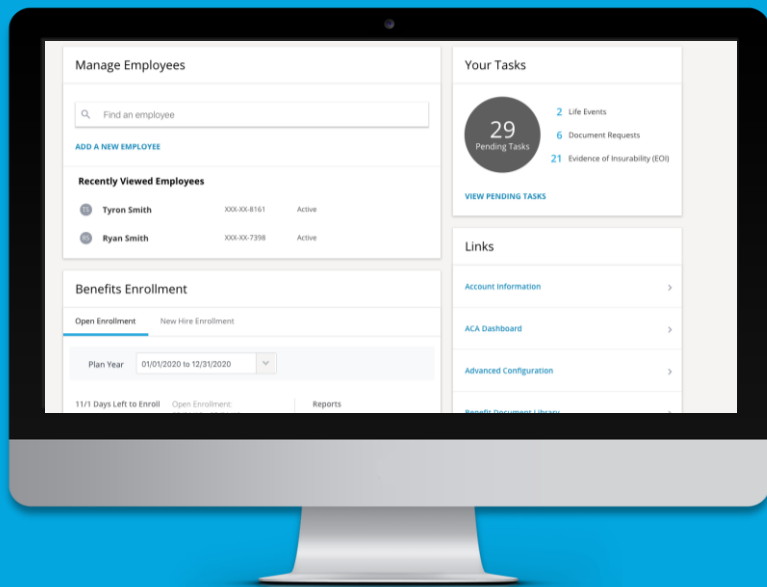
New Tasks/Work Status Processing Features

- ✓ 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.

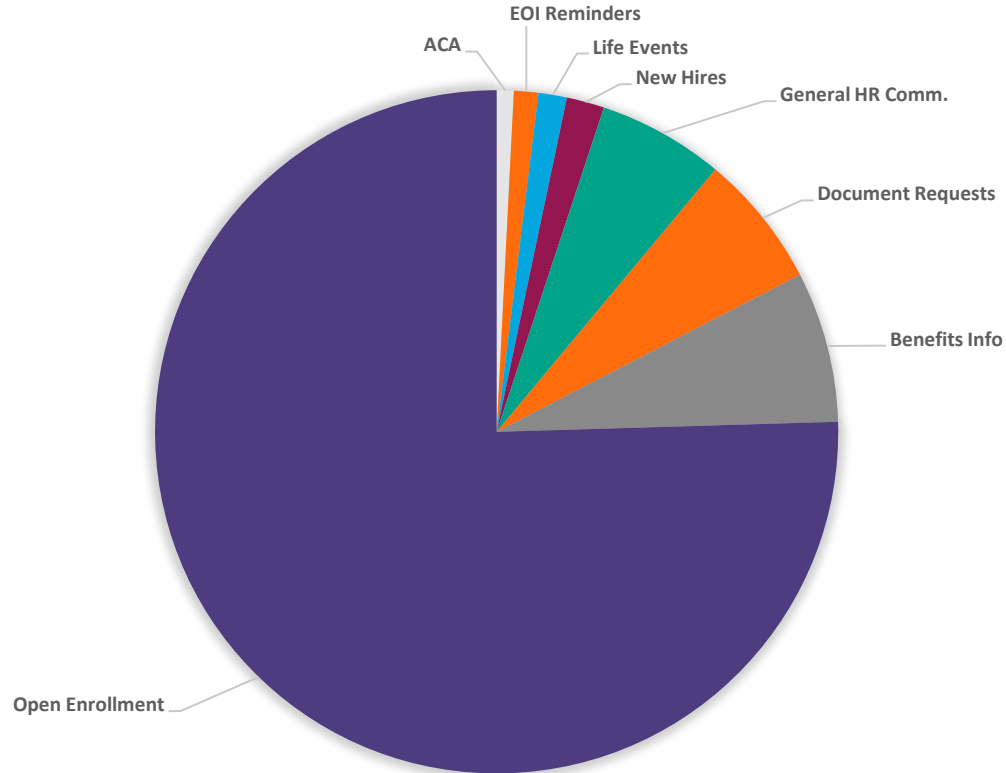


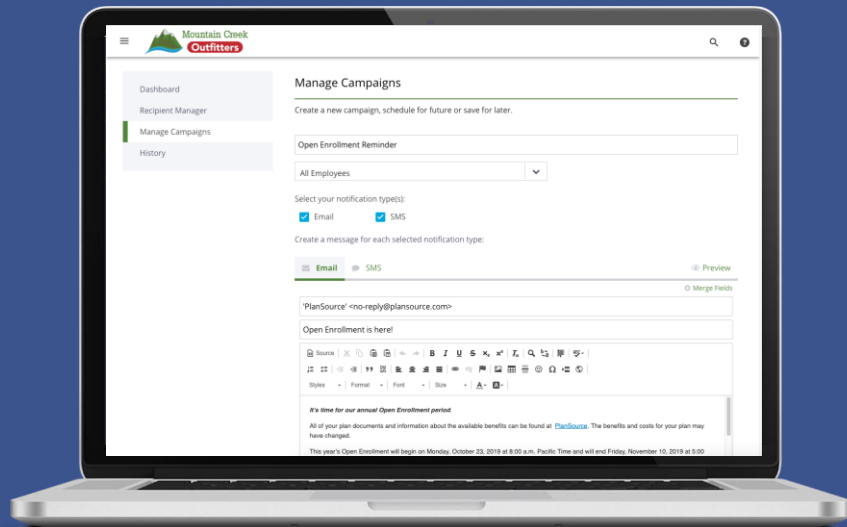
Both modes are complementary to each other and combining both within a single campaign, is a powerful way to capture their attention and increase employee engagement.

All-in-one Communication Platform

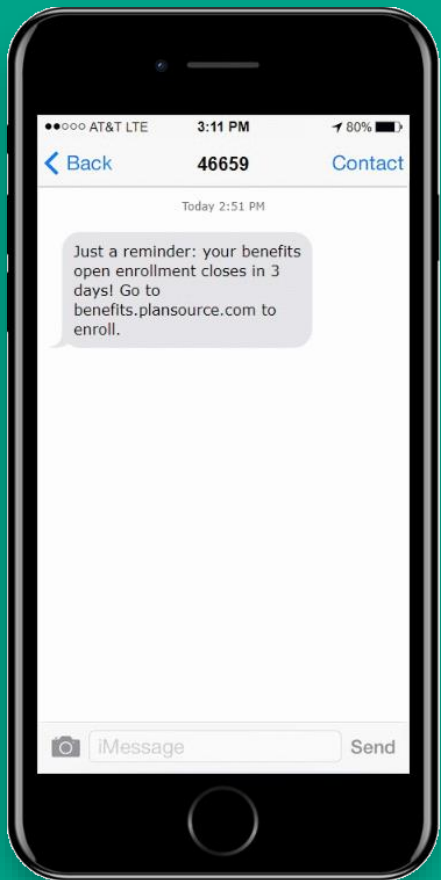
75% of communications YTD are related to open enrollment

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

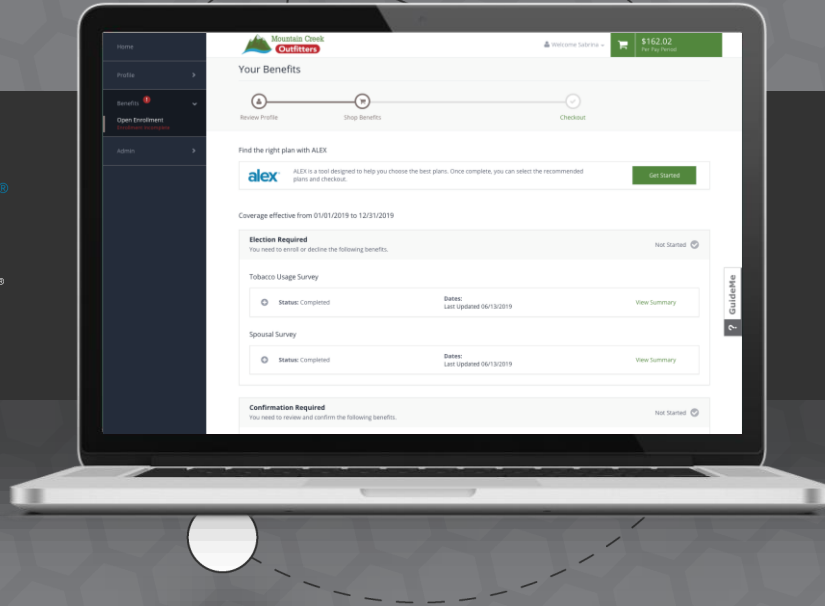
Jellyvision Integration

Hanna Jenkins



alex[®]

alex[®]
PLANSOURCE[®]



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

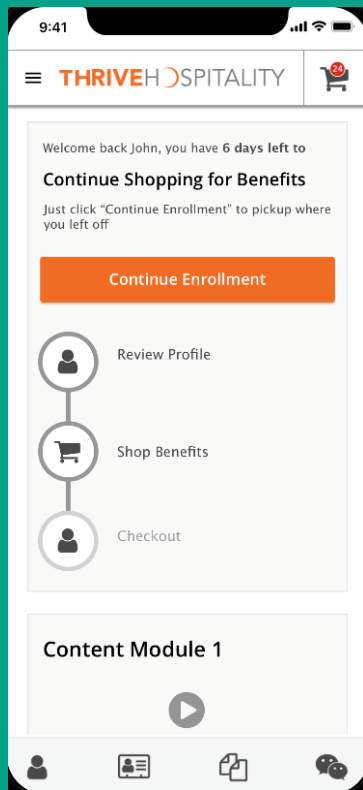
Jellyvision Beta Program – Available Now

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

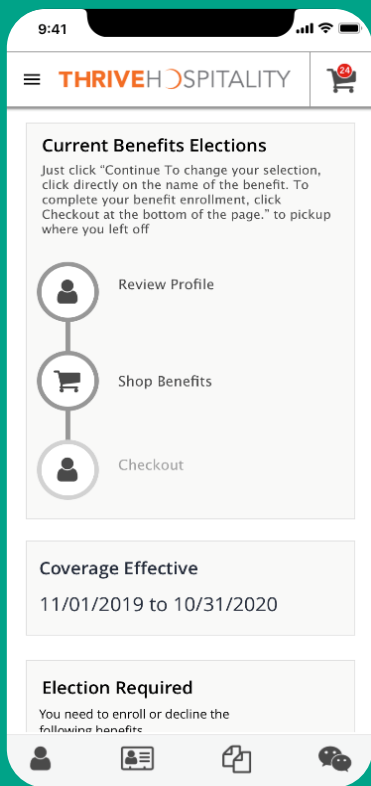
Mobile App Experience

Coming Soon!



New mobile app experience with
mobile enrollment!

***Coming Soon!**



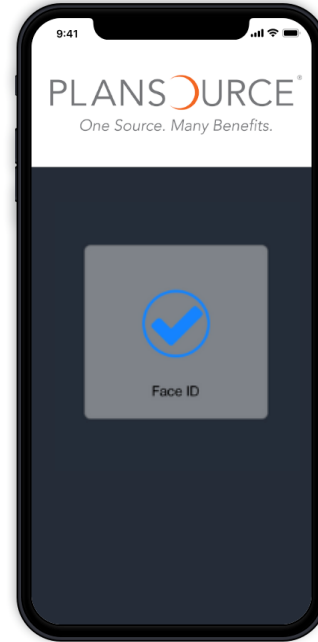
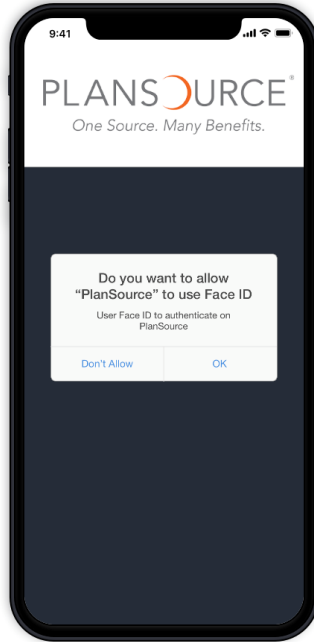
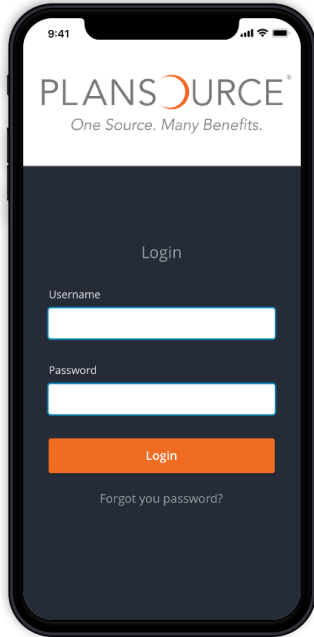
Access our advanced mobile-responsive employee experience from within the PlanSource Mobile App

Blended mobile app and enrollment menus for a cohesive experience:

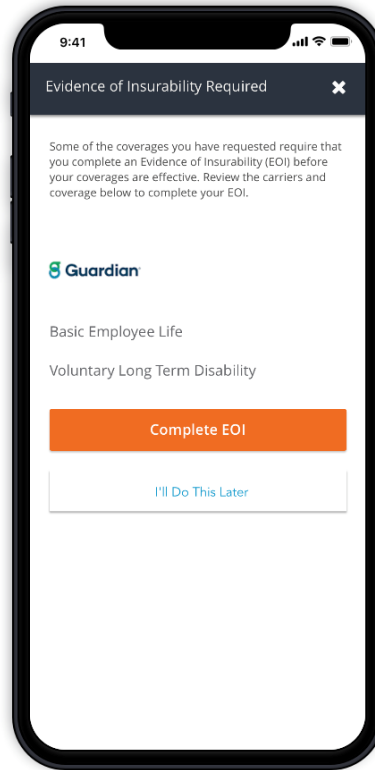
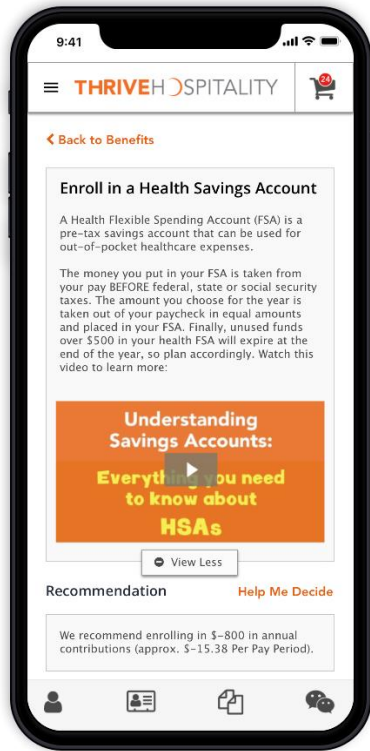
- **My Profile**
- **My Contacts**
- **My Documents**
- **Live Chat**

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

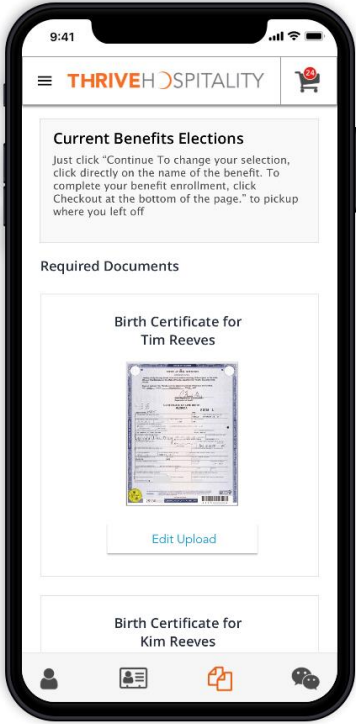
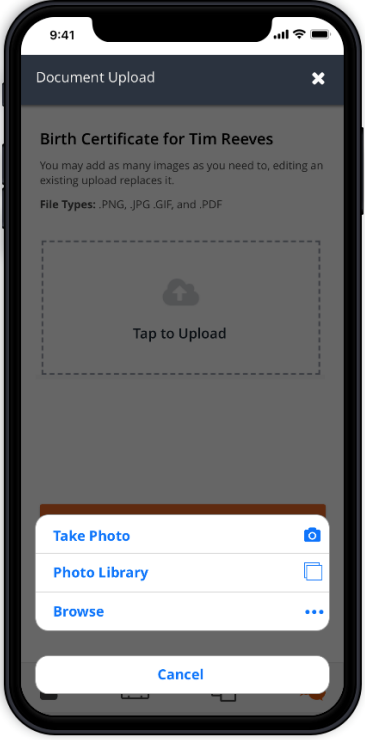
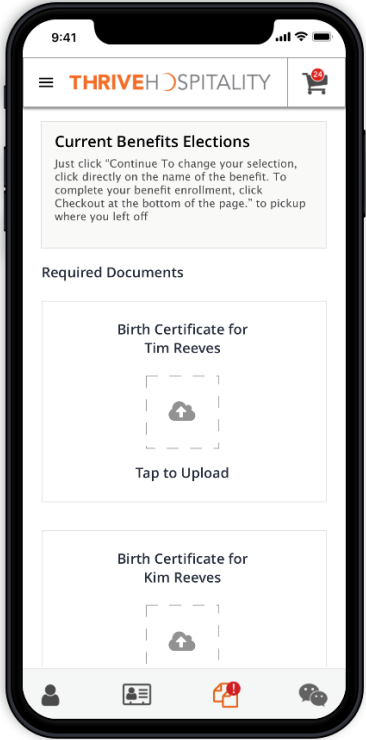
Plan Content Links

Decision Support

Jellyvision's ALEX

EOI Completion

Fast and Efficient Document Upload



Employee Experience Updates

Home

Profile

Benefits

Documents

THRIVE HOSPITALITY

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

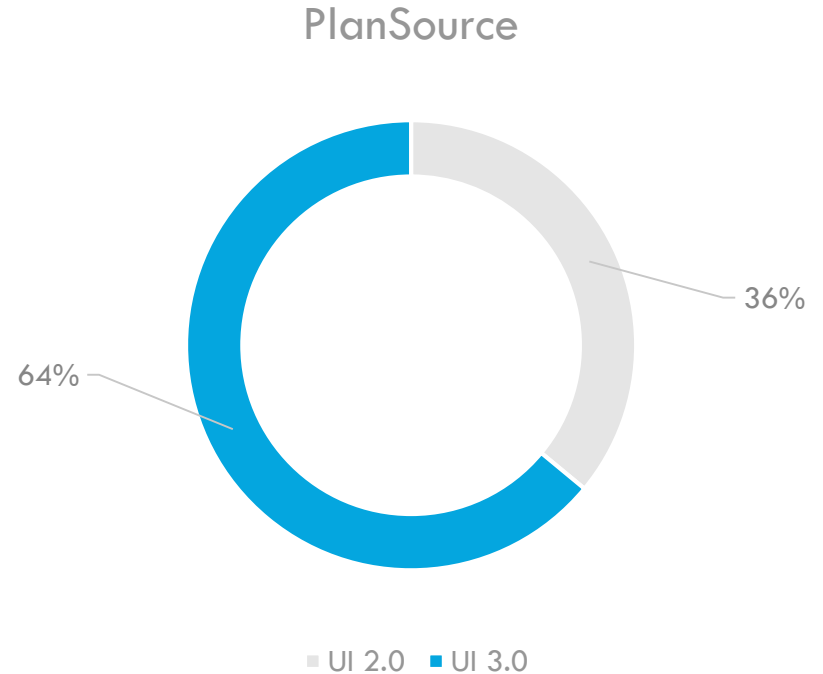


Migration by the Numbers

Employee Experience

Supporting documentation to make the switch:

- PlanSource University course
- GuideMe content



New Gender Options

New Gender Options

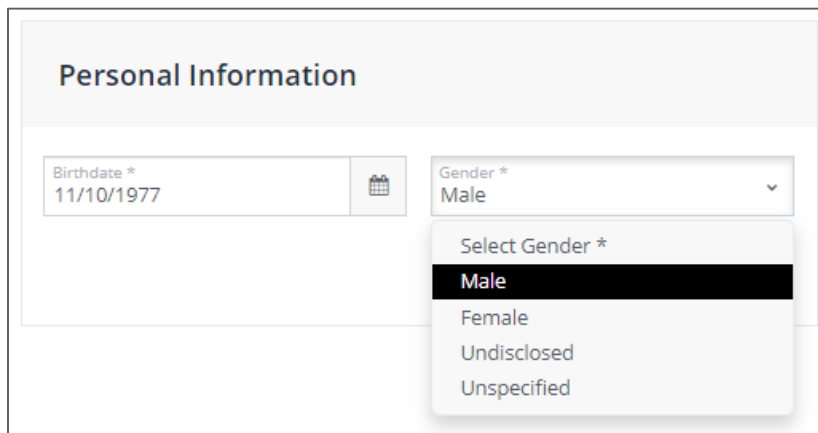
To accommodate 'Gender-Nonbinary' individuals

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. 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

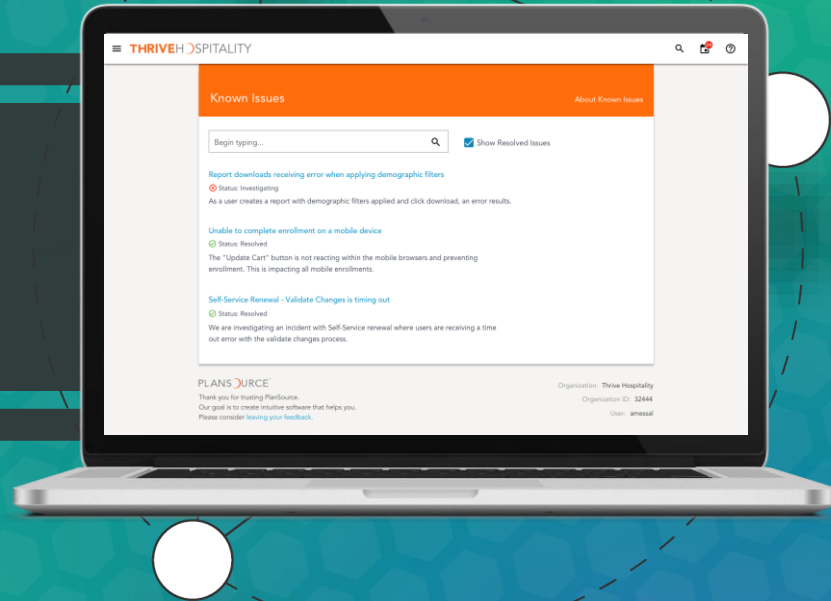
To accommodate 'Gender-Nonbinary' Individuals

- 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

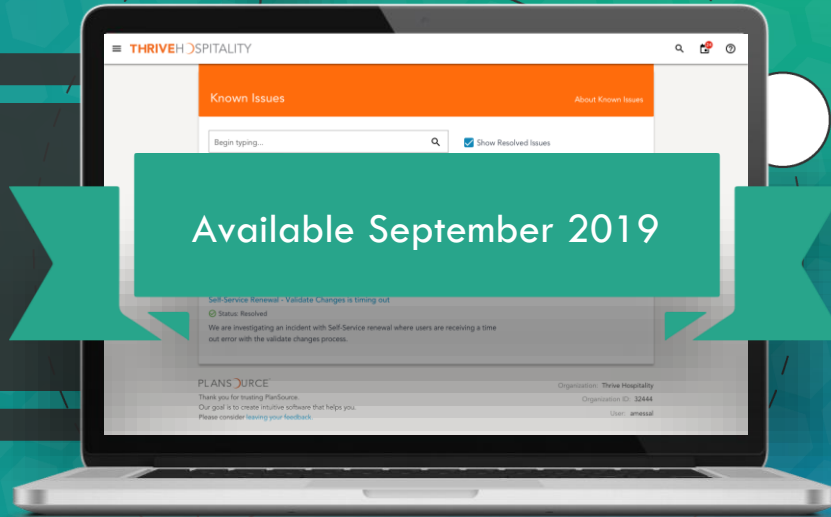
PlanSource Community Update

New Release Communication Tools



New Release Communication Tools

Available September 2019



New PSU Community: Known Issues

Available September 13, 2019

PLANSOURCE®

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[Courses](#)

[Library](#)

[Webinars](#)

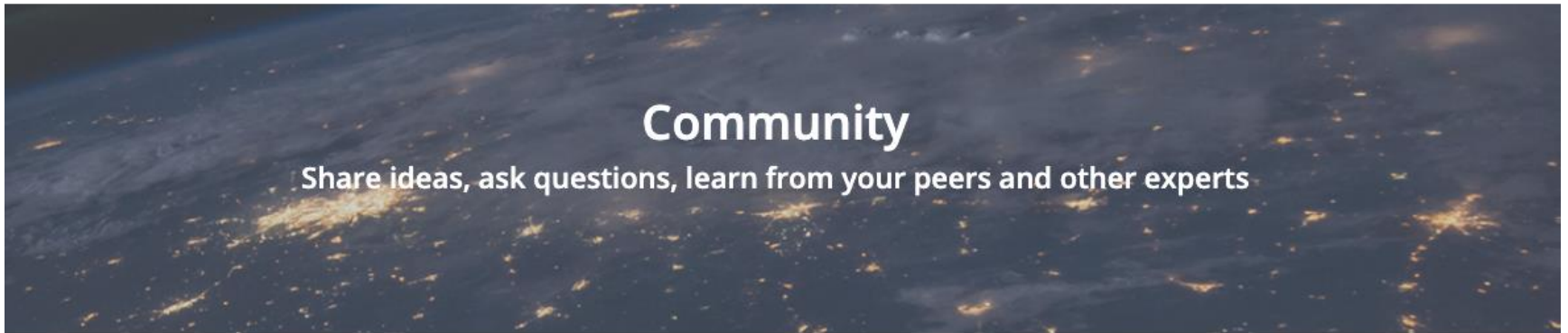
[Dashboard](#)

[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

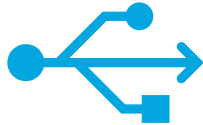
Update: There will be no cost associated with SMS Multi-Factor authentication for Admins or Employees

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

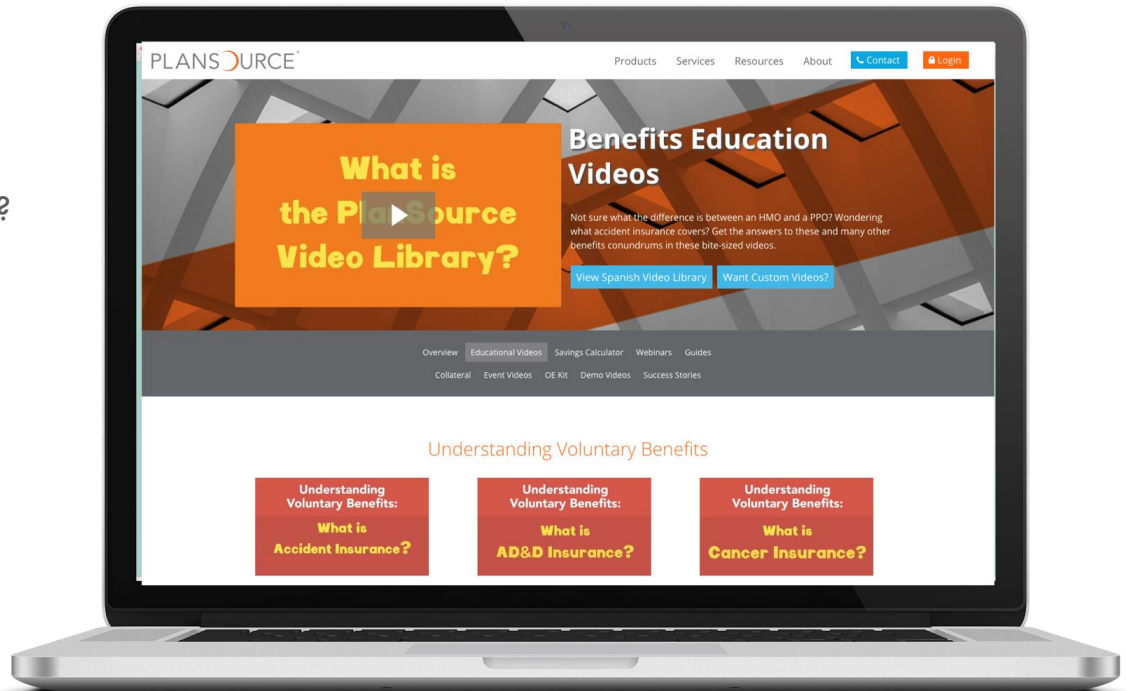
What is an Employee Assistance Program?

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 cartoon duck is positioned behind the letter "l".The Cigna logo consists of a stylized green tree with a human figure inside its trunk, positioned above the word "Cigna" in a blue, sans-serif font.The Guardian logo features a green stylized "G" icon followed by the word "Guardian" in a blue, sans-serif font.The MetLife logo includes a blue and green abstract icon 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 dots above the "u".The Allstate BENEFITS logo shows a blue circular icon with a hand holding a globe, followed by the text "Allstate" and "BENEFITS" in a blue, sans-serif font.The Colonial Life logo features a green stylized tree icon above the text "Colonial Life" and the tagline "Making benefits count." in a smaller font.The Lincoln Financial Group logo includes a red stylized "L" icon followed by the text "Lincoln" and "Financial Group" in a blue, sans-serif font.The Mutual of Omaha logo features a blue circular icon with a white silhouette of a person, followed by the text "Mutual of Omaha" in a blue, sans-serif font.The Prudential logo shows a blue circular icon with a white silhouette of a person, followed by the word "Prudential" in a blue, sans-serif font.The Sun Life Financial logo features a yellow sun icon above the text "Sun Life Financial" in a blue, sans-serif font.The Standard logo includes a blue stylized wave icon followed by the text "TheStandard" in a blue, sans-serif font.The VOYA FINANCIAL logo features the word "VOYA" in a large orange font above the word "FINANCIAL" in a smaller blue font.

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
Total Monthly Savings						\$1,822.50 
Total Per Employee Per Month Savings						\$1.82

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[®] | 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[®] | 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[®] | 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



 **Guardian**[®] • PLANSOURCE[®] | **BOOST**

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.

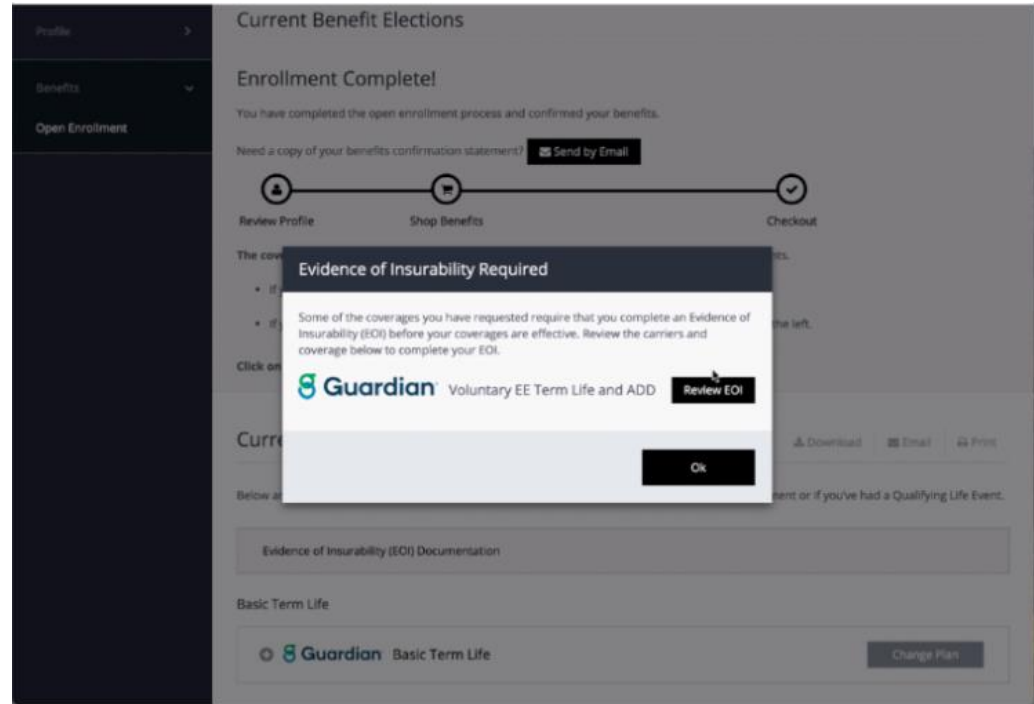
Evidence of Insurability Integration – Available Now

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

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

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 ▶

- ✔ 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

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All Complete

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✔ 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



PlanSource Eclipse'19

See highlights (videos, presentations, handouts) at eclipse.plansource.com



— PLANSOURCE —
ECLIPSE

**MAY 5 - MAY 7
2020**

The Ritz-Carlton,
Laguna Niguel



Q&A