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

Type your question into the "Questions" panel

Today's Speakers

Hanna Jenkins
Assistant Vice President of Product

Ryan Jepson
Product Manager

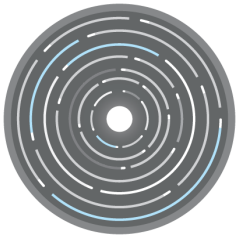
Polaris Product Release

September 12, 2019

Quarterly Releases

Continuous investment and innovation

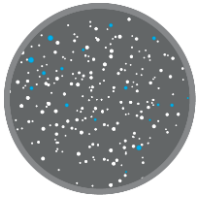
NEXT RELEASE



POLARIS

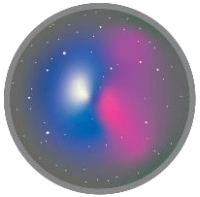
September 12, 2019

UPCOMING RELEASES



GEMINI

December 12, 2019

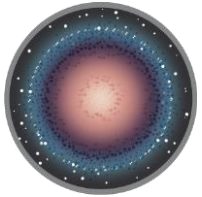


NEBULA

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

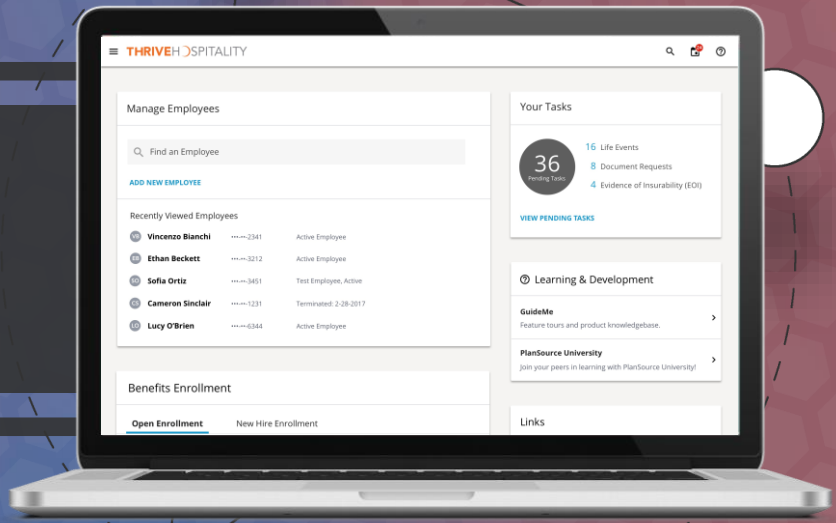
Wrap-Up and Q&A

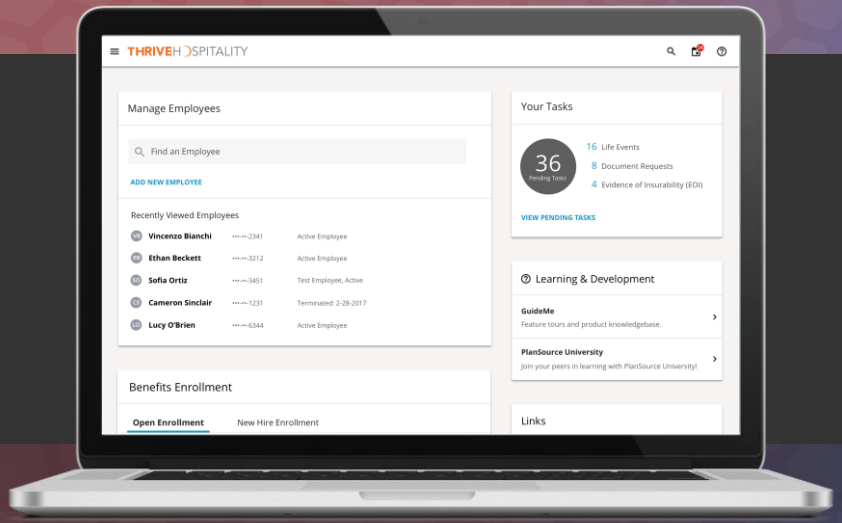
New HR Experience

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

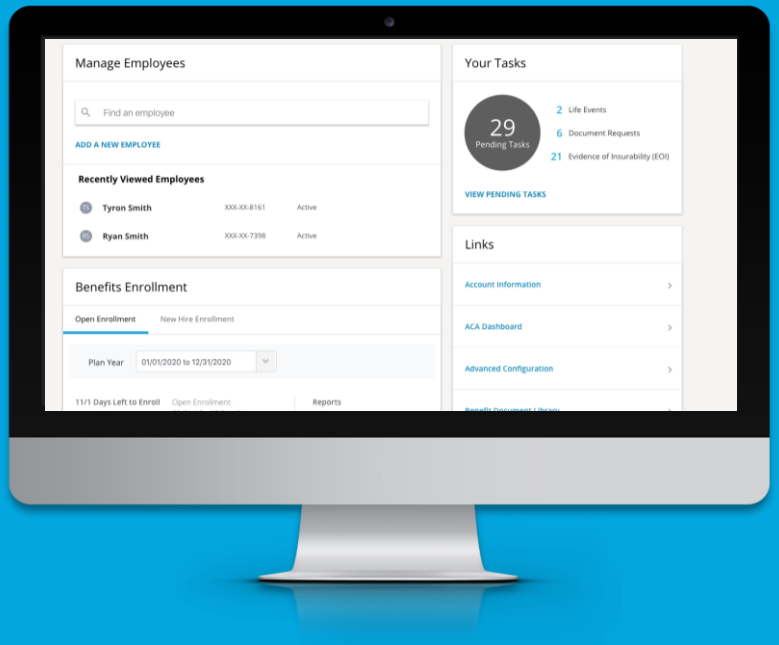
- ✓ Updated links to only show when user has the correct capability/role
- ✓ Click to chat with and w/o Guideme enabled
- ✓ ACA links added
- ✓ Search behavior improved when only one record is found

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

BENEFIT COMMUNICATIONS

Targeted Employee

COMMUNICATIONS

Targeted Employee COMMUNICATIONS

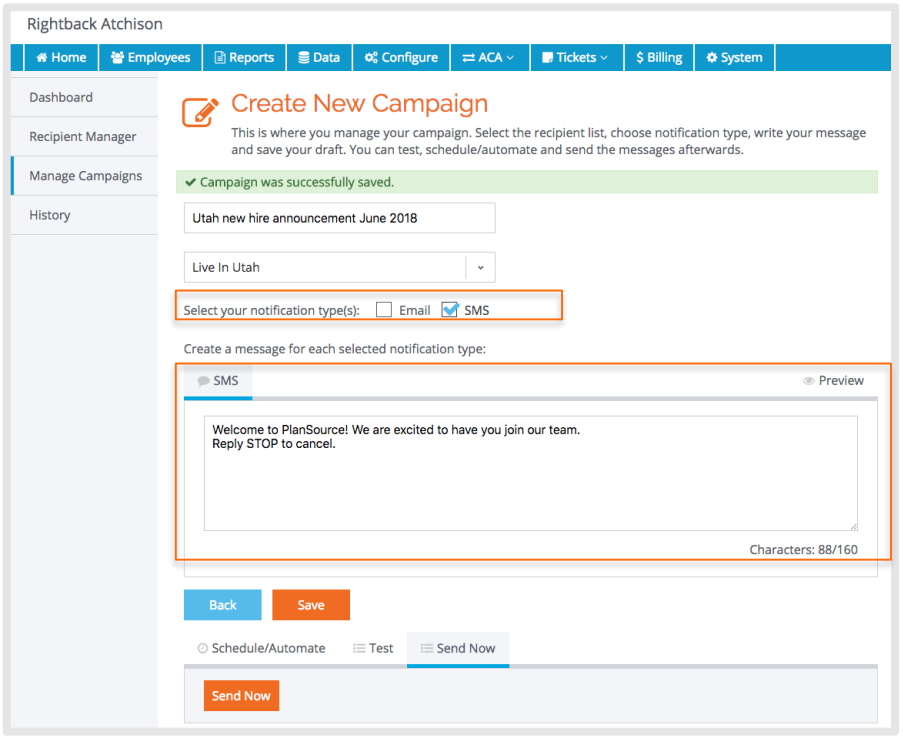
Campaign management

Customizable audience

Tools for testing, scheduling and tracking

Integrated Text Messaging

Sending text messages is as easy as sending email campaigns



- 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

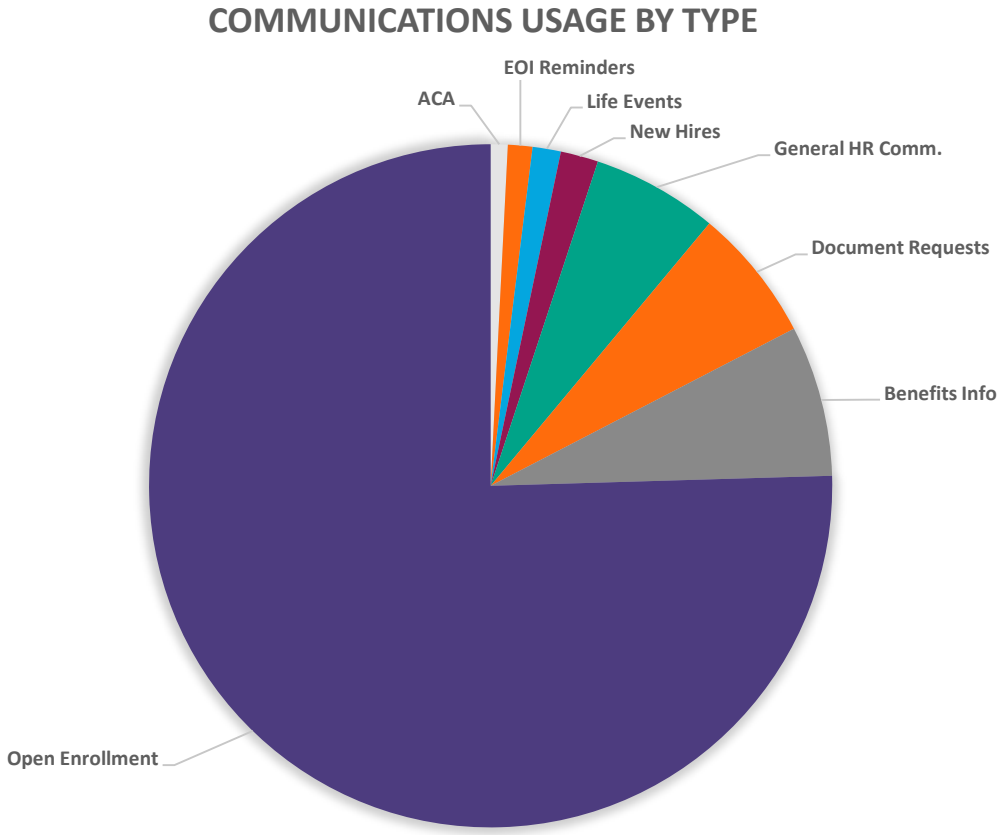
Emails are great for detailed and official communication, supporting documents and attachments and are a more formal way of communication.

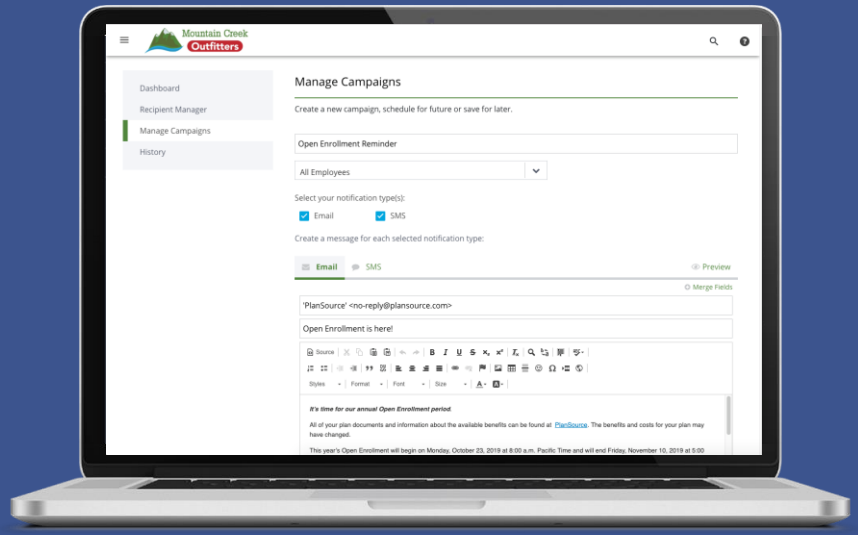
Text messages are great for reminders, access to links or downloads and better access to employees with almost double the open/click rate.

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.

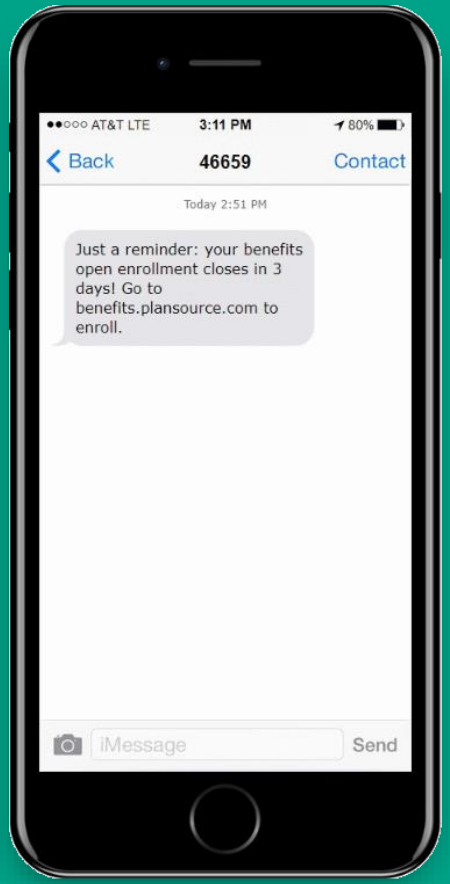
All-in-one Communication Platform

75% of communications YTD are related to open enrollment




Mountain Creek Outfitters
Dashboard
Recipient Manager
Manage Campaigns
History
Manage Campaigns
Create a new campaign, schedule for future or save for later.
Open Enrollment Reminder
All Employees
Select your notification type(s):
Email
SMS
Create a message for each selected notification type:
Email
SMS
Preview
Merge Fields
'PlanSource' <no-reply@plansource.com>
Open Enrollment is here!
It's time for our annual Open Enrollment period.
All of your plan documents and information about the available benefits can be found at PlanSource. The benefits and costs for your plan may have changed.
This year's Open Enrollment will begin on Monday, October 23, 2019 at 8:00 a.m. Pacific Time and will end Friday, November 10, 2019 at 5:00

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

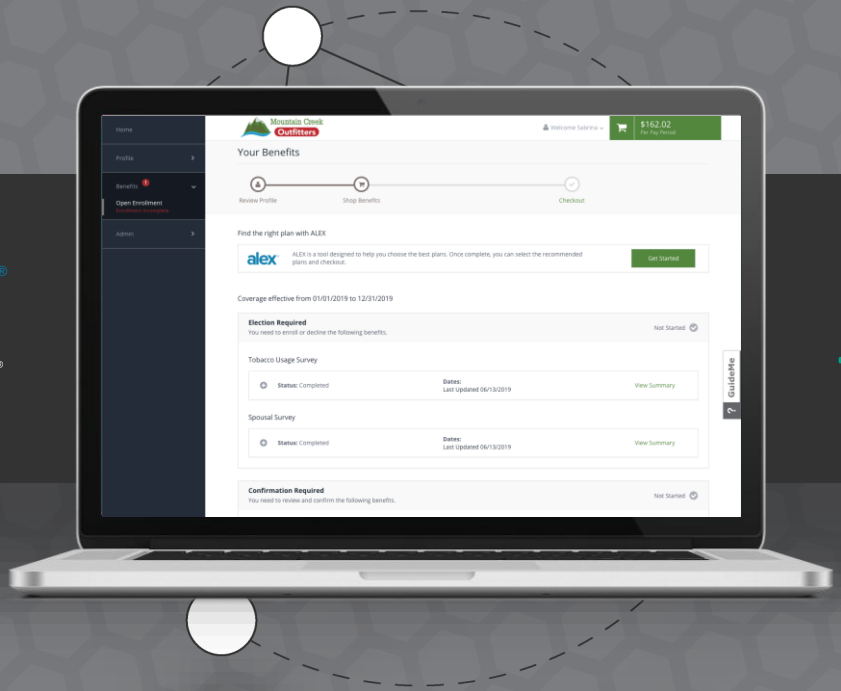
Hanna Jenkins

Jellyvision®

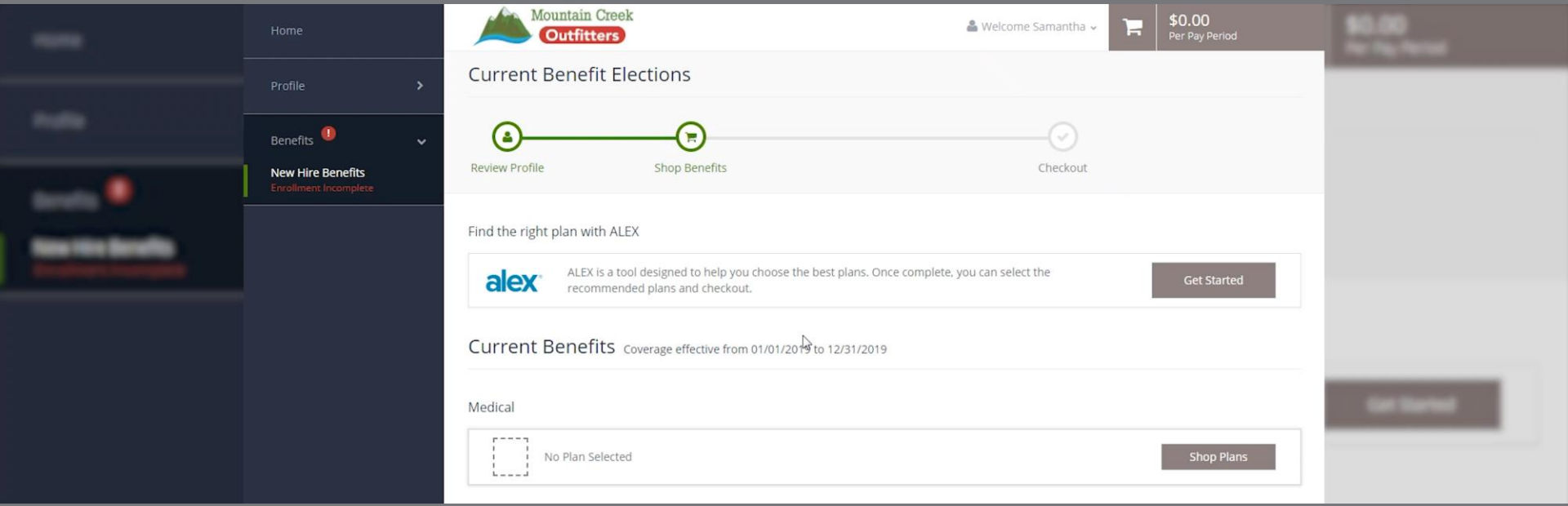
alex®

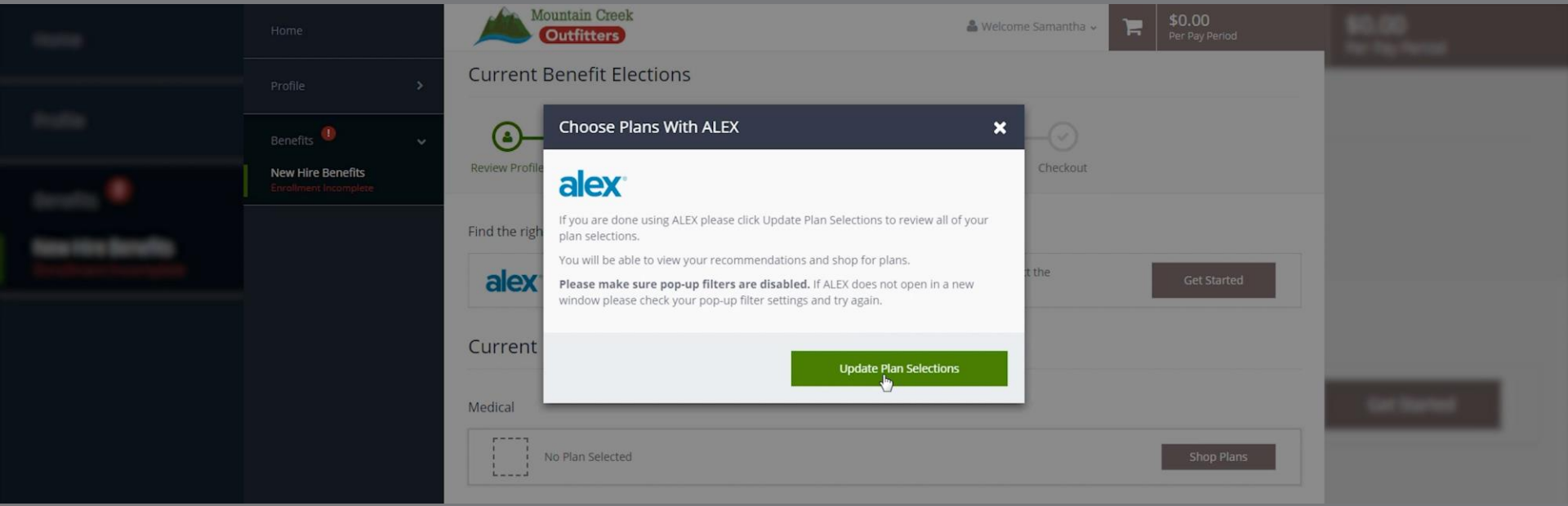
alex®

PLANSOURCE®



Better Together


Home
Profile
Benefits
New Hire Benefits
Enrollment Incomplete
Mountain Creek Outfitters
Welcome Samantha
$0.00
Per Pay Period
Current Benefit Elections
Review Profile
Shop Benefits
Checkout
Find the right plan with ALEX
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


Home
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Welcome Samantha
$0.00
Per Pay Period
Current Benefit Elections
Review Profile
Checkout
Find the righ
Get Started
Current
Medical
No Plan Selected
Shop Plans
Choose Plans With ALEX
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

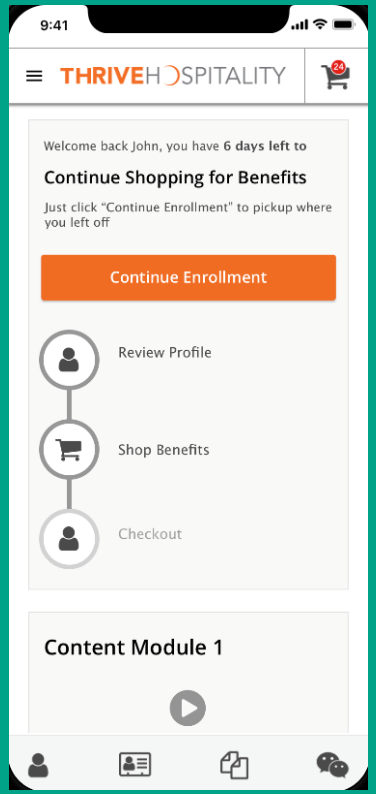
Jellyvision Beta Program – Available Now

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

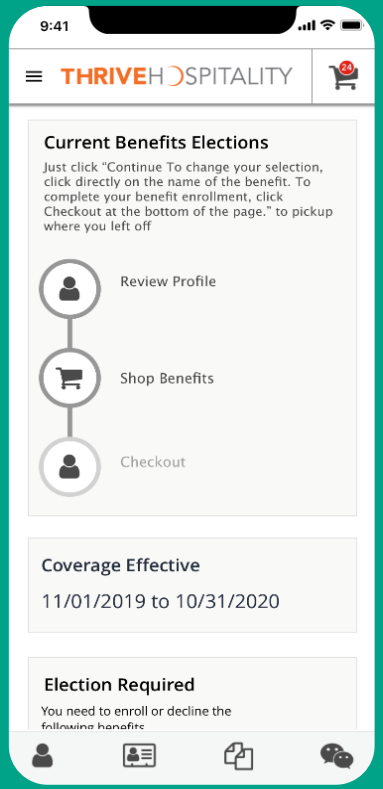
Mobile App Experience

Coming Soon!



New mobile app experience with mobile enrollment!

*Coming Soon!



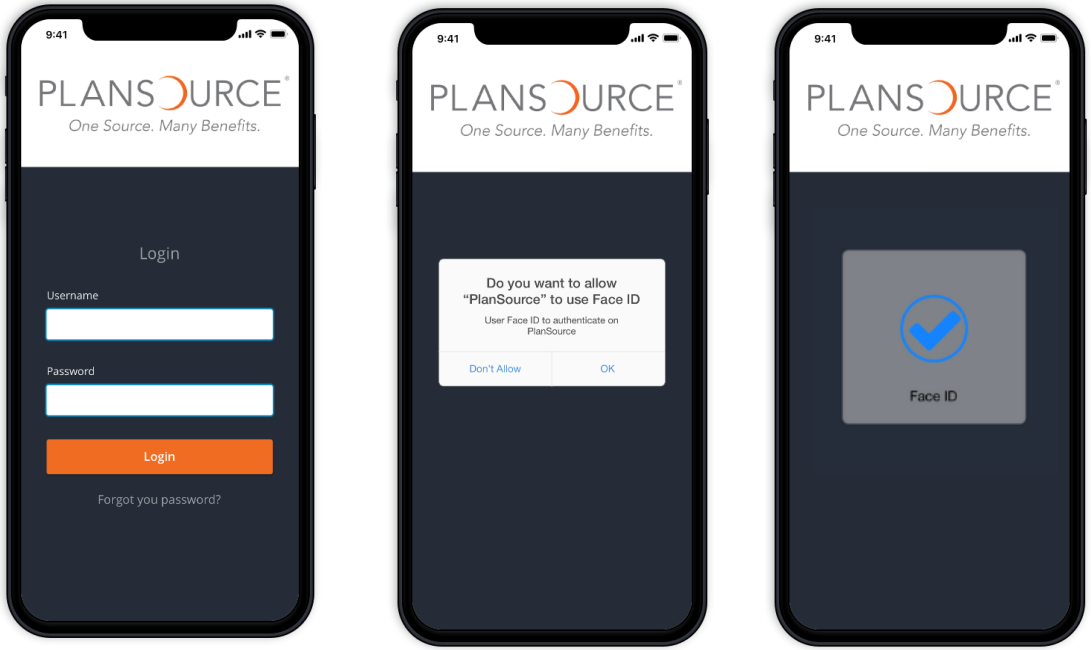
Access our advanced mobile-responsive employee experience from within the PlanSource Mobile App

Blended mobile app and enrollment menus for a cohesive experience:

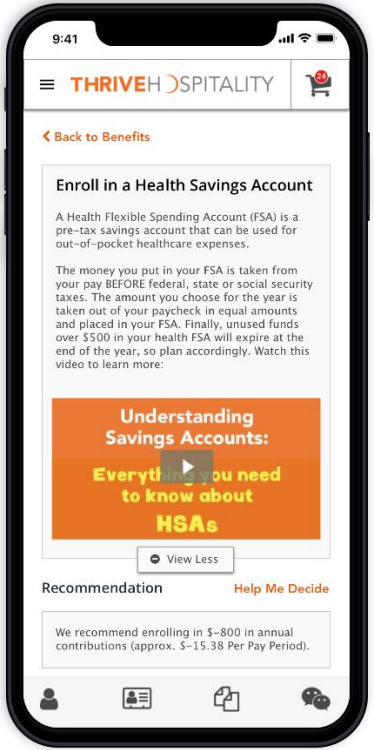
- **My Profile**
- **My Contacts**
- **My Documents**
- **Live Chat**

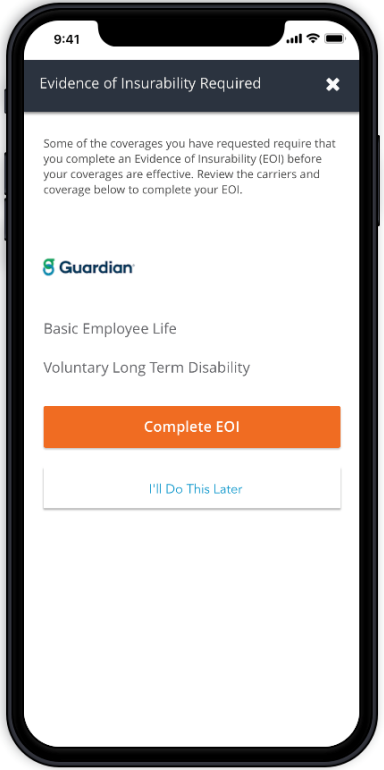
Upgraded Mobile Application Authentication Methods

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



Seamless Employee Experience – Never Leave the App





Compatible with external links and integrations

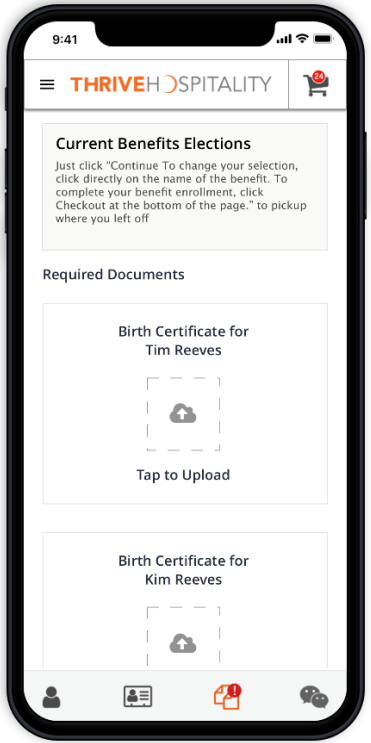
Plan Content Links

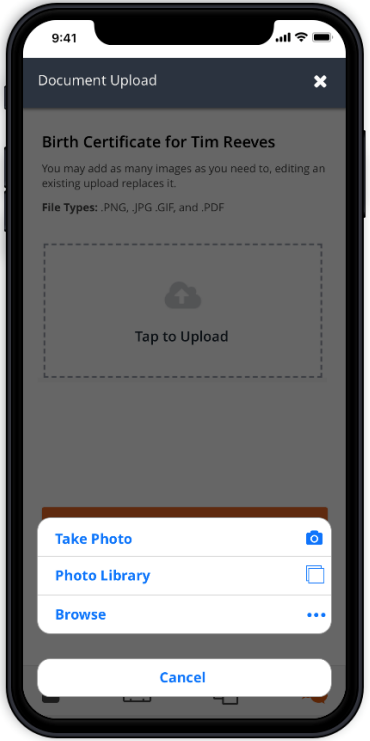
Decision Support

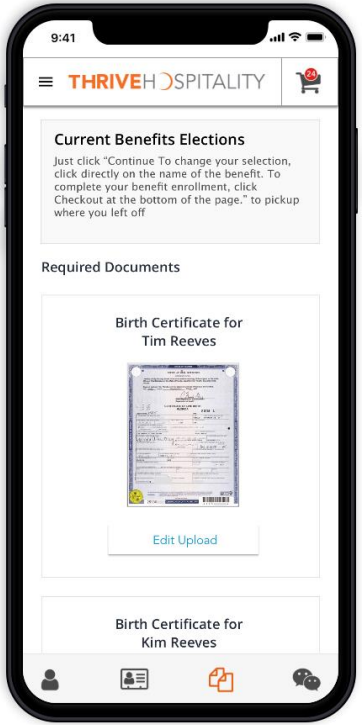
Jellyvision's ALEX

EOI Completion

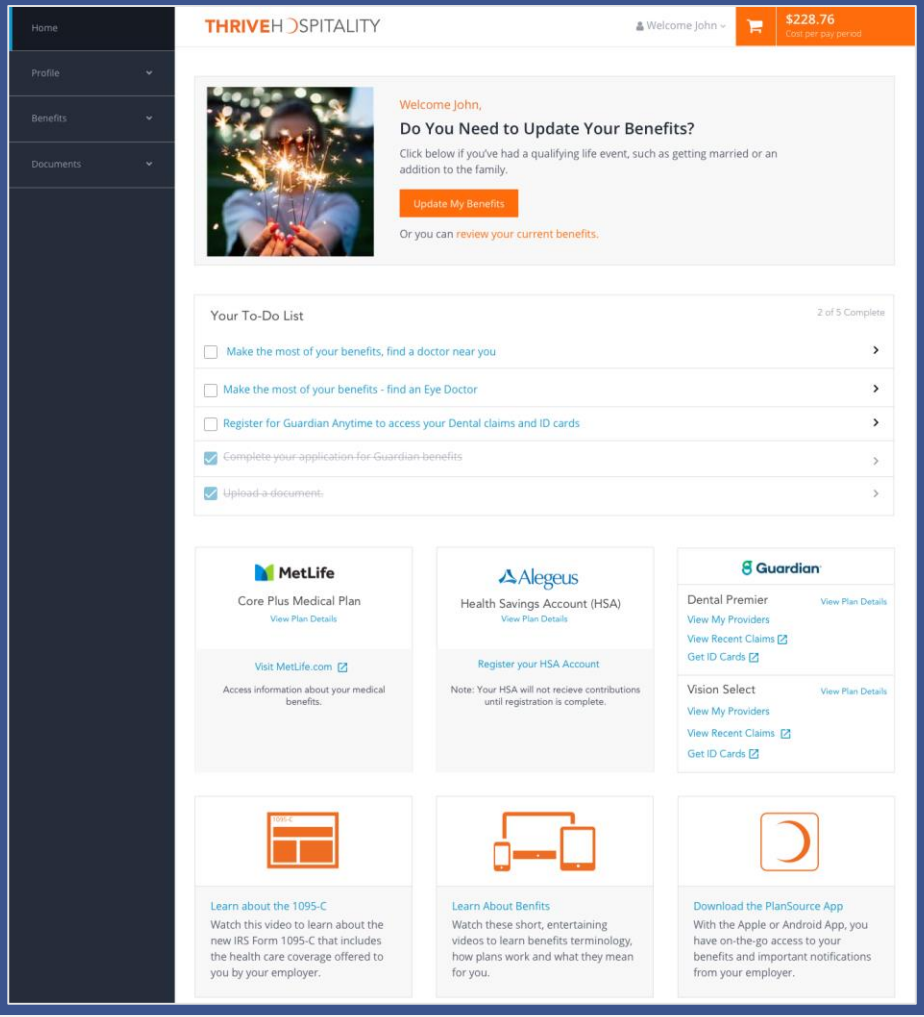
Fast and Efficient Document Upload







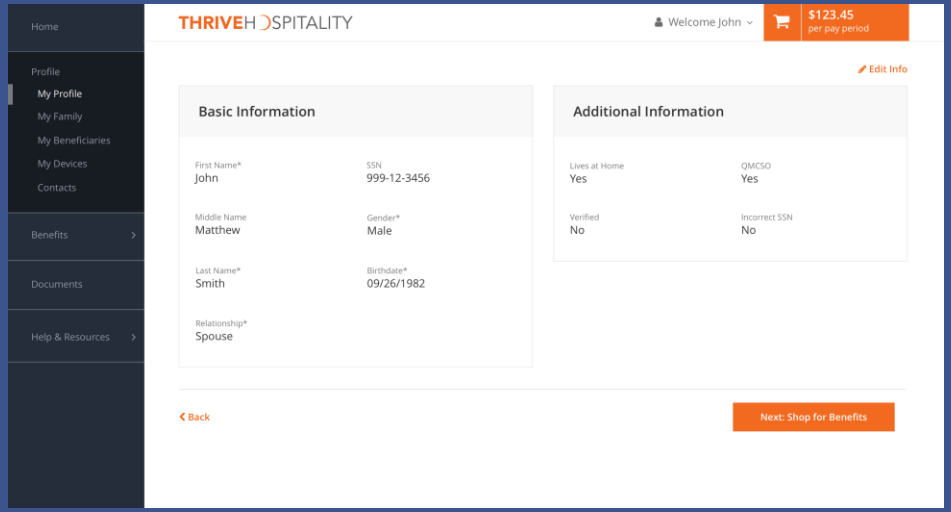
Employee Experience Updates



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



- 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

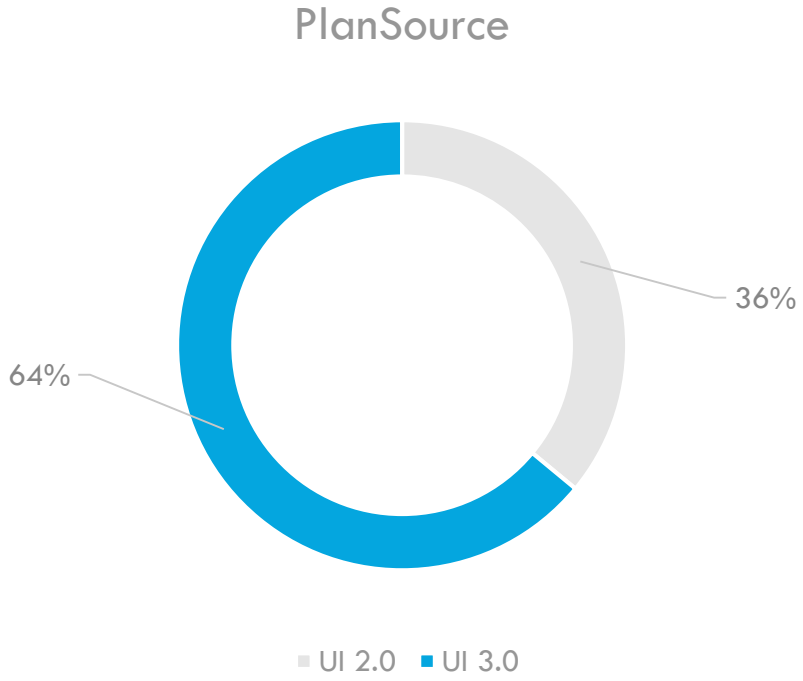
Employee benefits experience

Migration by the Numbers

Employee Experience

Supporting documentation to make the switch:

- PlanSource University course
- GuideMe content



New Gender Options

New Gender Options

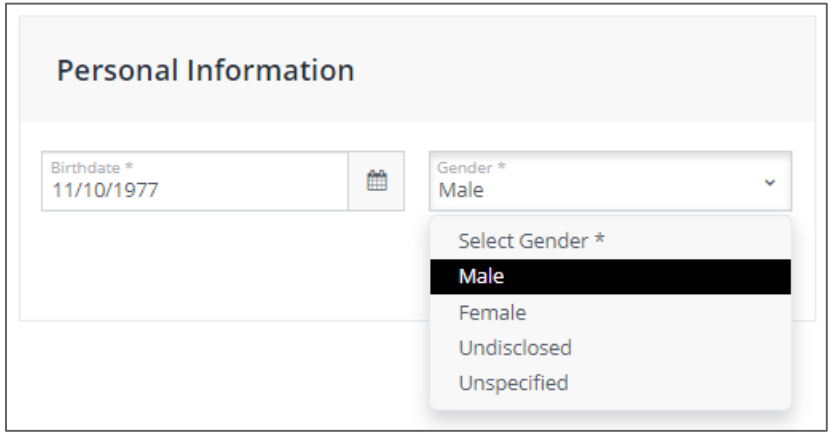
To accommodate 'Gender-Nonbinary' individuals

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.



Future Enhancements

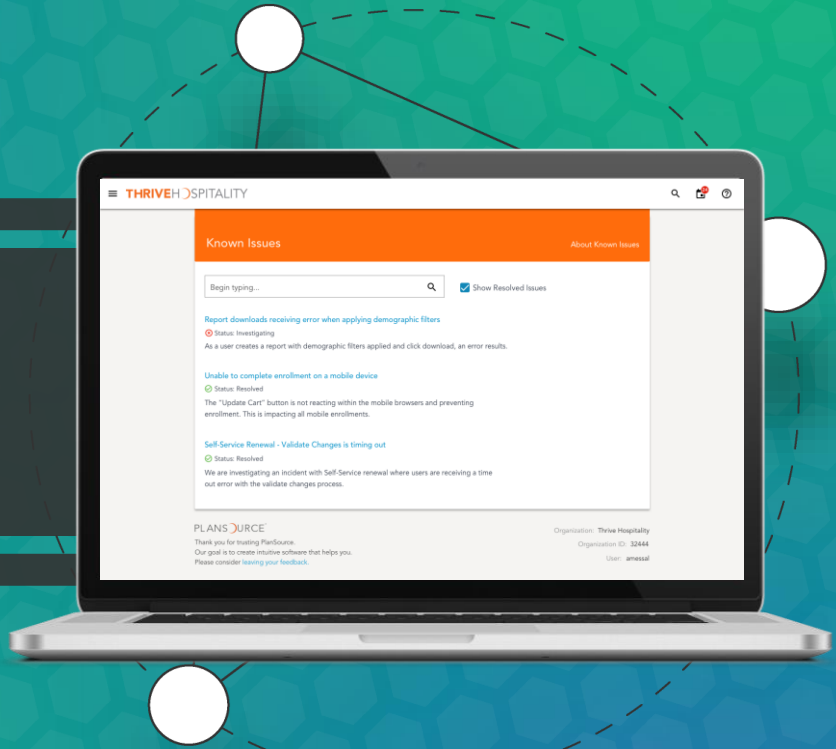
To accommodate 'Gender-Nonbinary' Individuals

- 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

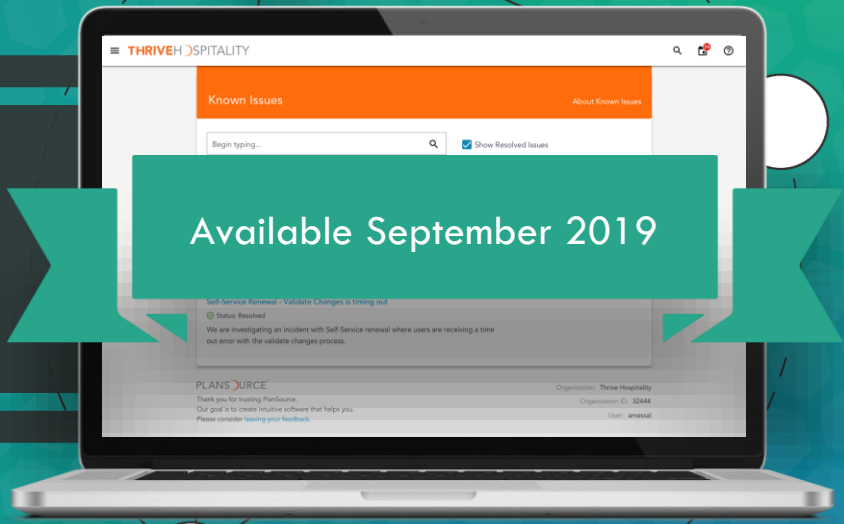
PlanSource Community Update

New Release Communication Tools



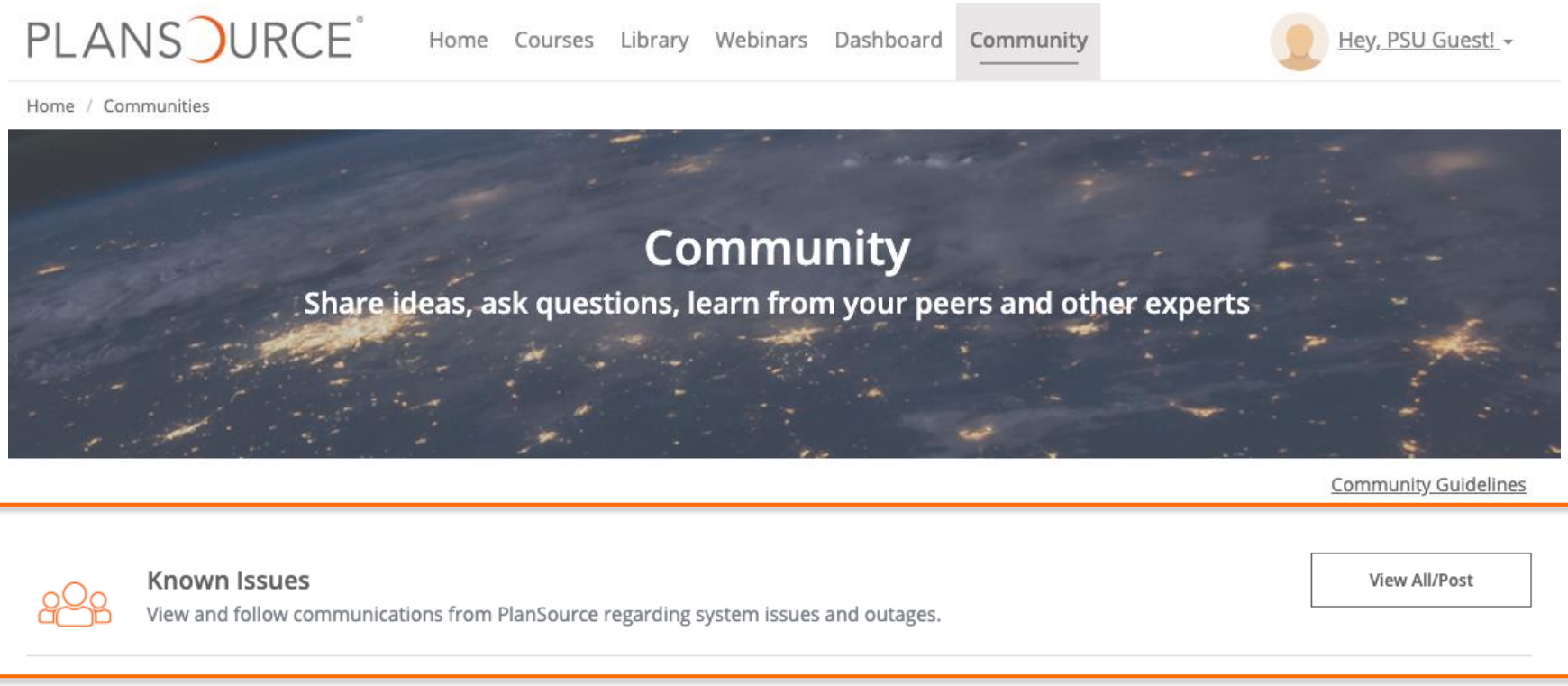
New Release Communication Tools

Available September 2019



New PSU Community: Known Issues

Available September 13, 2019



Multi-Factor Authentication

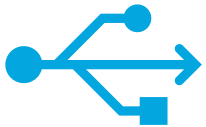
4 different ways to authenticate

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?

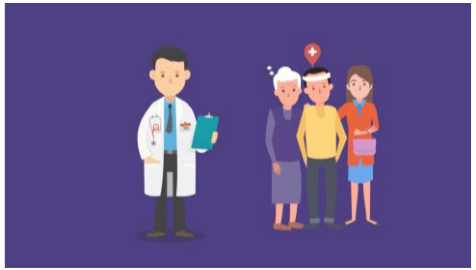
Commuter Benefits

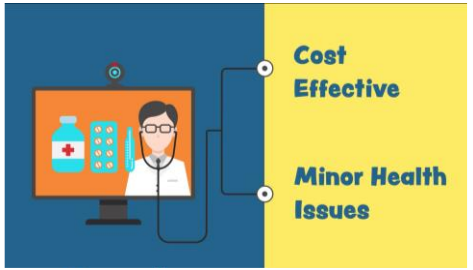
Importance of Mental Health

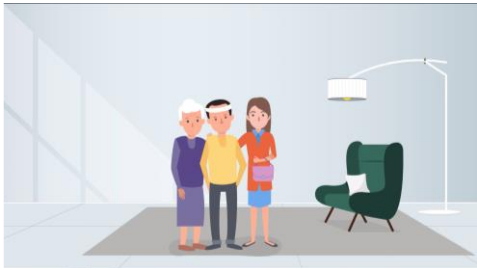
New video about Employee Assistance Programs

Importance of Managing Cost of Care

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







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

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

Available 9/1/2019

Guardian is no longer offering a credit program as of 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.

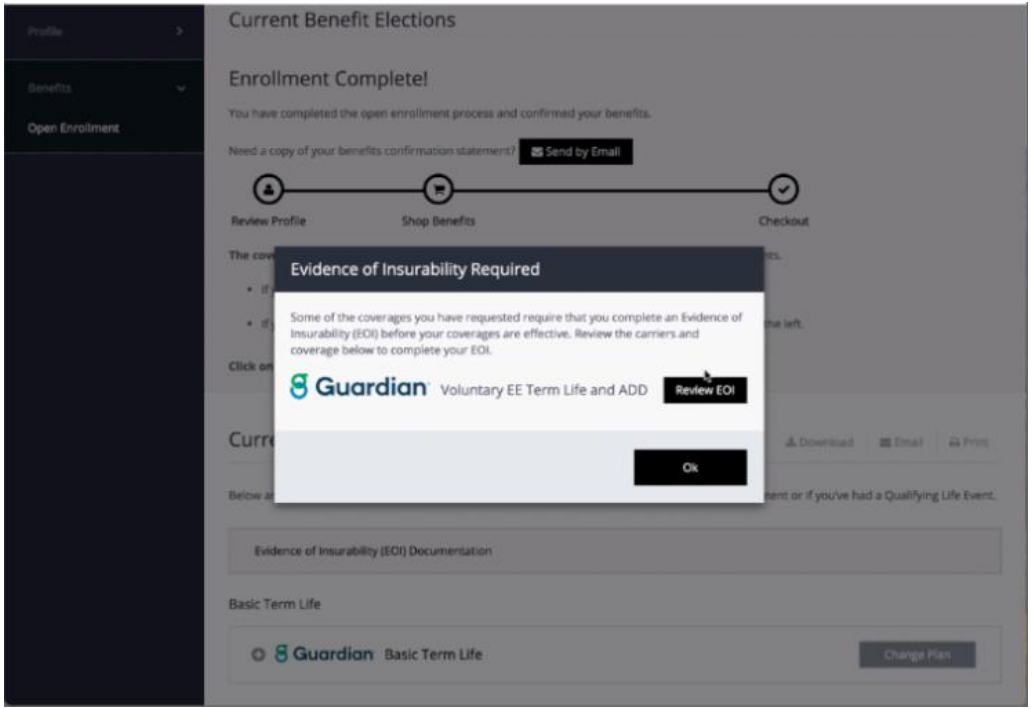
Evidence of Insurability Integration – Available Now

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

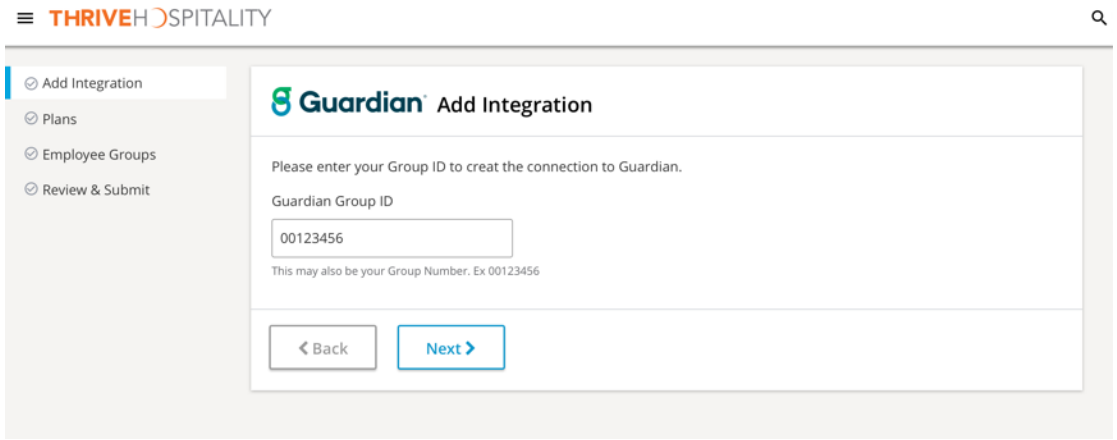
Setup process goes from weeks to minutes!

Plan Configuration API

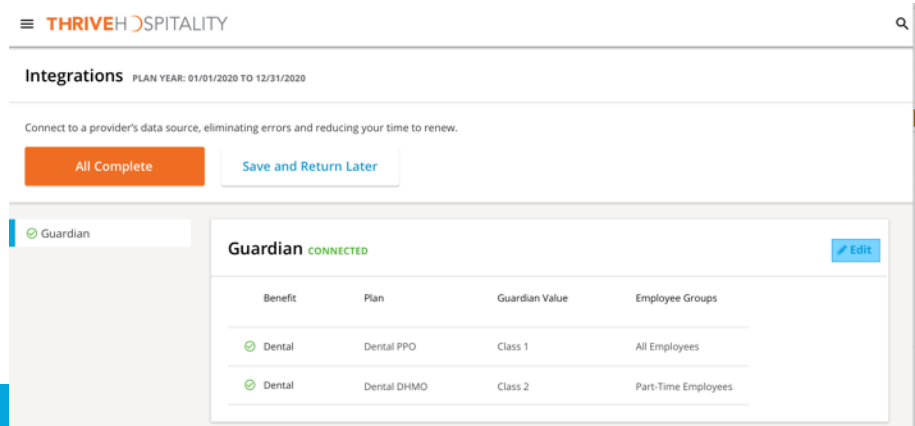
Automates setup by pulling product and rate information for Dental from Guardian's system. Eliminating customer effort and reducing errors and time to implement.

Dental Available - September 2019

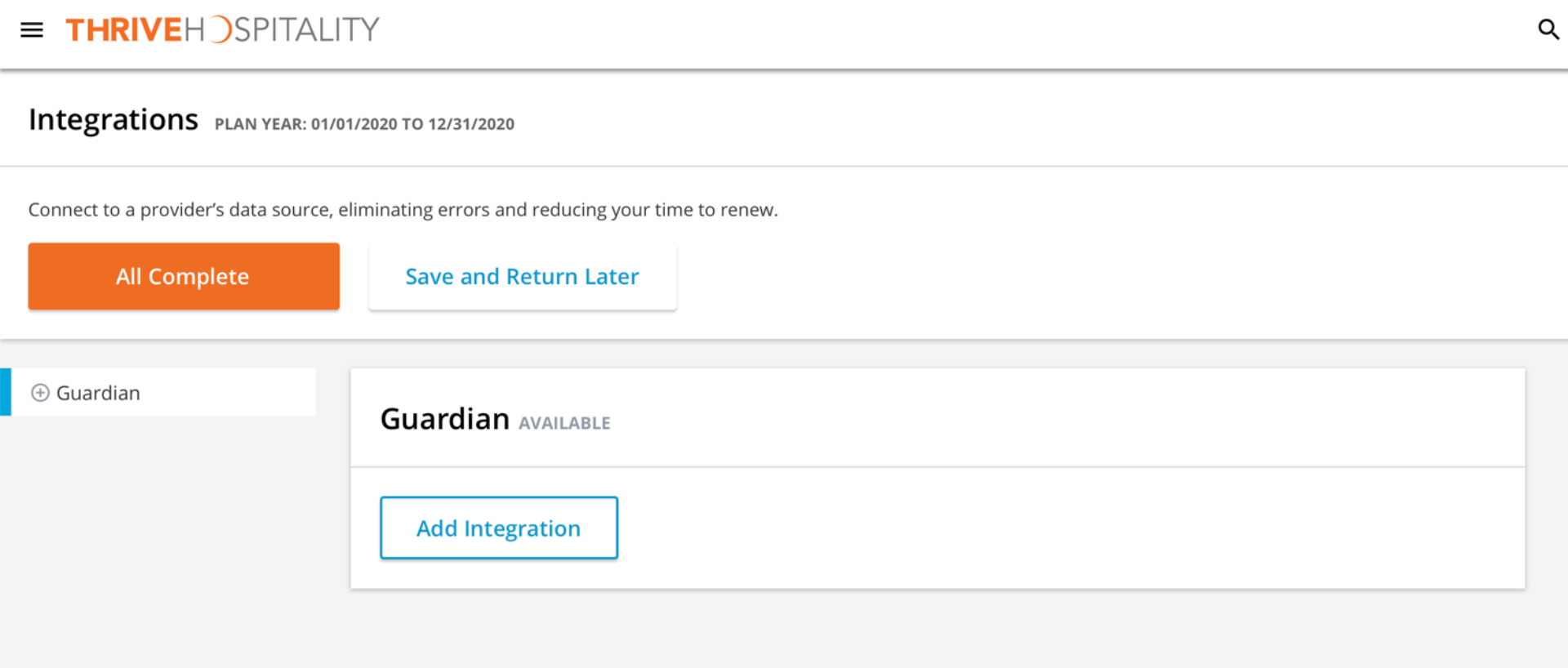
All other products will be available – March 2020



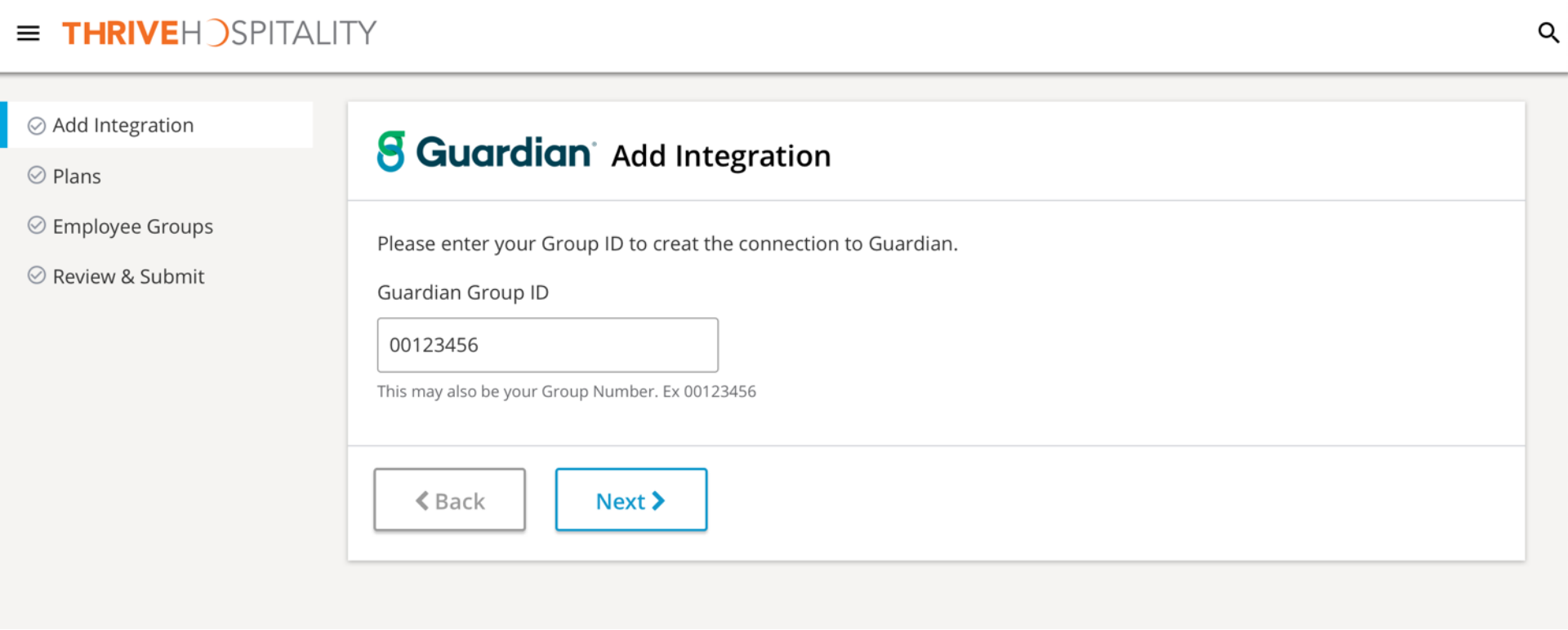
Communicates all rates, eligibility rules, effective dates, etc. automatically



Plan Configuration in Guided Renewal Workflow



Plan Configuration in Guided Renewal Workflow



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

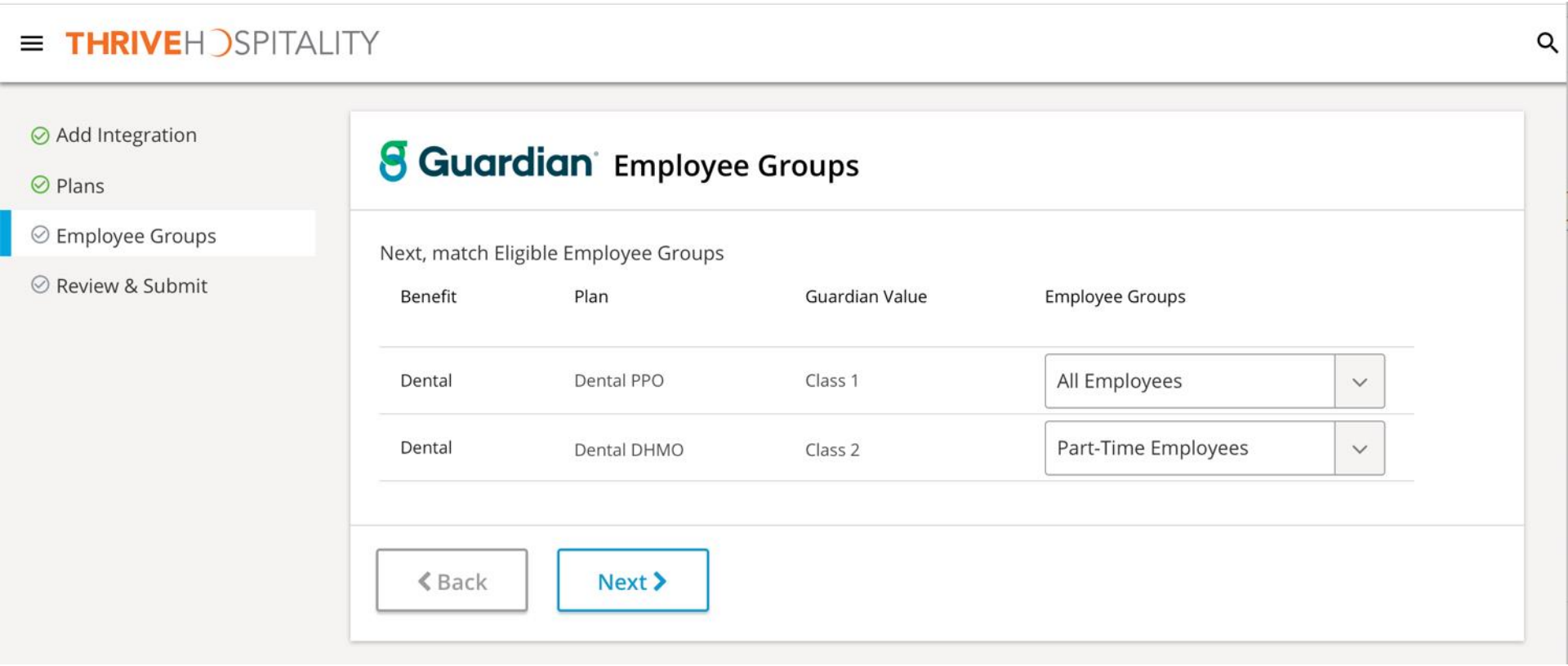
Guardian Plans

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


THRIVEHOSPITALITY
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
Dental
Dental DHMO
Class 2
Part-Time Employees
Back
Next

THRIVEHOSPITALITY

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

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

Confidential and proprietary