

PLANSOURCE[®]

Spend Less Time
Managing Employee
Benefits

ENTER >



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Maximize the Benefits of Your Benefits

With our end-to-end benefits software, you'll spend less time managing ben admin tasks and more time doing what matters.

Free up your HR team to focus on the bigger picture

25%

Total HR team time savings due to automation

3 weeks

HR time saved during open enrollment

Help employees make smarter, more confident benefits decisions

2 hours

Time saved per new hire just with educational videos alone

+11%

Increase in HDHP participation

Spend less time worrying about compliance

6%

Average % of ineligible dependents uncovered with DependentIQ

100%

Electronic 1095-C forms to minimize ACA printing and mailing costs

Reduce the cost of offering employee benefits

\$3,500

Average annual savings per ineligible dependent removed with DependentIQ

25%

Total technology cost savings with Boost partner pricing

“PlanSource transformed tasks that used to take weeks or months for 1,000s of employees down to just minutes.”

– CHRIS FORBECK, HUMAN RESOURCES BENEFITS MANAGER, BRANDSAFWAY



What You Need From Your Benefits Tech Partner



DEEP BENEFITS EXPERTISE

We approach benefits with laser-like focus, drawing on decades of benefits, HR and technology experience to deliver a customer experience designed to make you wildly successful.



PLATFORM CONFIGURABILITY

We'll handle your most complex business rules and benefits set ups, so you can automate everything and focus HR time anywhere else.



APIS AND INTEGRATIONS

Connect employee benefits with everything else. We integrate directly with insurance carriers via real-time APIs and integrations with 800+ different HCM, payroll and other third-party systems.



STRONG CARRIER PARTNERSHIPS

Through PlanSource Boost, we're modernizing the customer experience with real-time API integrations, simplified billing, an optimized employee shopping experience and preferred pricing.



ADD-ON BENEFITS SERVICES

We offer a full suite of add-on benefit services, so you can outsource any (or all!) of the time-consuming ben admin tasks your team doesn't have time for to our experts.



PLATFORM SECURITY

We're serious about keeping your data and system secure. PlanSource maintains SSAE18 SOC 2 Type 2, HIPAA, GDPR and ISO 27001 standards and compliance to back it up.



An Unparalleled Benefits Experience

With a clean, intuitive and mobile-friendly experience for employees and HR Teams, groundbreaking API integrations and strong partnerships with leading carriers, we've got benefits covered from start to finish. PlanSource is dedicated to giving you the best experience possible for benefits communications, shopping, enrollment, billing, compliance and ongoing administration.

 Benefits Software

 Communications

 Shopping

 Enrollment

 Billing

 Compliance

 Administration



More Automation. Less Administration.

COMMUNICATIONS

Create and schedule targeted, multi-channel communications campaigns that help you reach and engage remote workers while saving hours of HR admin time.

SHOPPING

We guide employees through the process so they can shop for benefits the same way they shop for other products online.

ENROLLMENT

Streamlined workflows and real-time integrations deliver a mobile-friendly enrollment experience that's designed to drive higher engagement, plan participation and HR efficiency.

BILLING

Generate consolidated self-bills and reconcile carrier-provided bills based on carrier rules for billing and mid-month changes.

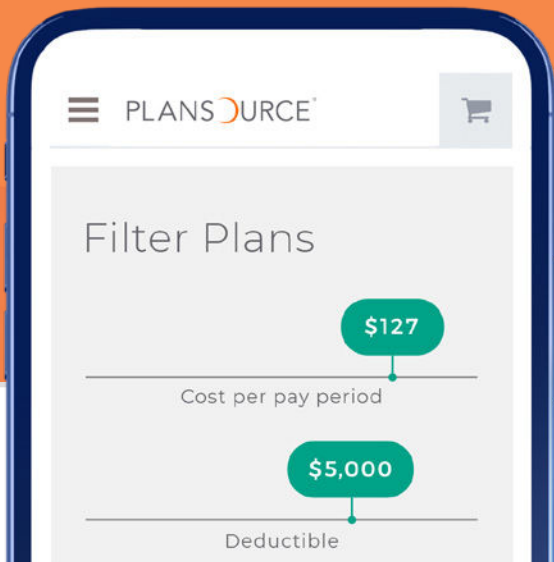
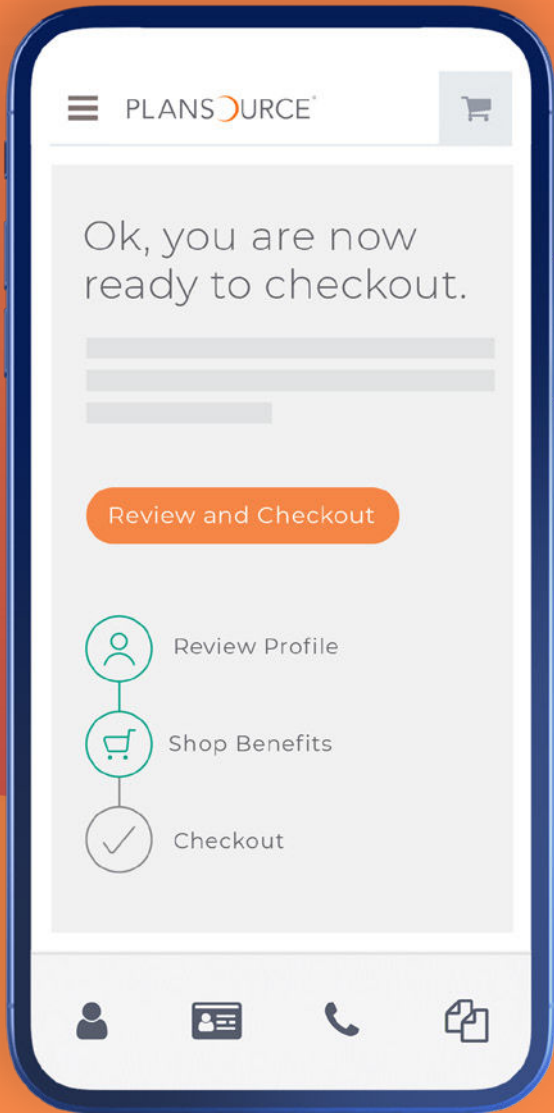
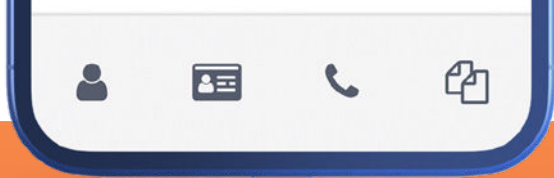
COMPLIANCE

We'll make sure your entire team stays compliant with Federal and State ACA requirements, plus automatically enforce and verify your unique eligibility rules and business workflows.

ADMINISTRATION

Configure, manage and automatically enforce even the most complex benefit plans and eligibility workflows within one easy-to-use system.





A Mobile-Friendly Benefits Experience

Flexibility for digital, distributed teams

LET EMPLOYEES ROAM FREE!

Not everyone has access to a laptop or desktop computer. And not everyone can enroll in benefits while at work. That's why our software is mobile-responsive and is also available in a convenient mobile app, allowing employees to enroll from a laptop, tablet or phone – or switch between all three!

GIVE HR TEAMS FLEXIBILITY!

Our HR experience is intuitive, practical and extremely flexible. We built it to allow HR teams to quickly and efficiently take care of jobs they do most often, wherever they are. Now, your team can take care of tasks like approving life events, sending out benefits communications or viewing OE stats – all while waiting in line at Starbucks.



Help Employees Get More Out of Their Benefits

Insurance products are complex and can be confusing, and the enrollment process has historically been a complicated affair. Employees shouldn't have to be benefits experts, and in the modern workplace, they have precious little time to spare.

That's why we've created an intuitive and easy-to-use shopping experience that is similar to other online interactions. Personalized content and intelligent plan recommendations are woven right into the experience, so employees understand their benefits options and make the best decisions for their needs.



MOBILE FRIENDLY

Provide a mobile-friendly shopping experience – employees can enroll on their phone, tablet or laptop for a seamless experience.



COMMUNICATIONS

Send targeted communications to specific employee groups based on seniority, location, department and numerous other factors.

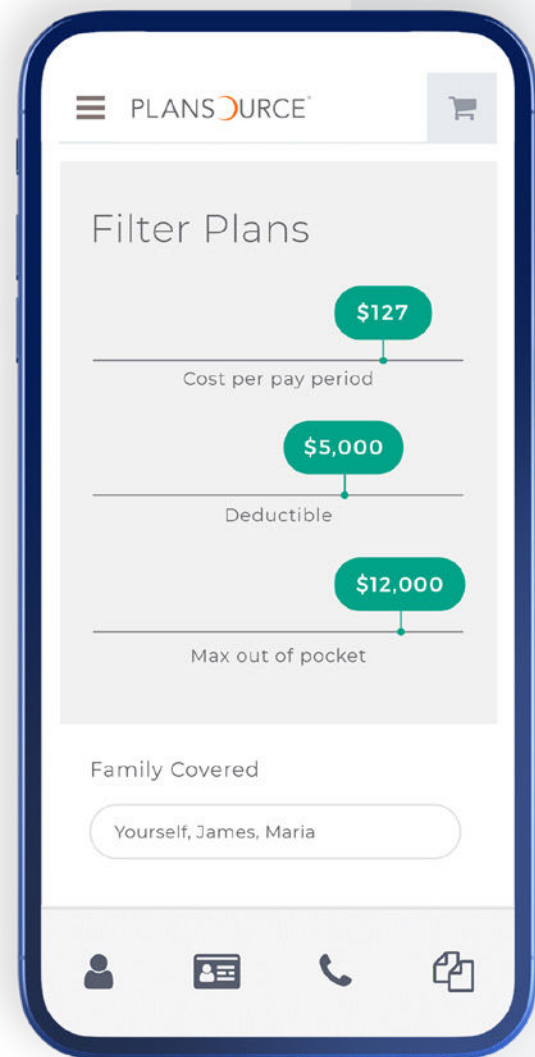


LIFE EVENT CHANGES

Automatically enforce your rules for life events as your employees get married, grow their families, or lose other coverage throughout the year.



Provide Employees with the Easiest Path to the Right Benefits



BENEFITS SHOPPING

Employees are guided through the enrollment process so they can shop for benefits the same consumer-friendly way they shop for other products online.



EDUCATIONAL CONTENT

Personalize the experience by adding videos, documents, tools and messages that vary based on demographics, location, family status and other factors.



PERSONALIZED RECOMMENDATIONS

Help employees make more confident decisions about their benefits by providing personalized recommendations based on AI-powered models and data-driven insights.



Empower Smarter, More Confident Benefit Decisions

Benefits are confusing – half of employees find shopping for health insurance “very stressful.” When employees lack knowledge about benefits, they often end up underinsured or buy coverage they don’t need.

PlanSource offers advanced AI and Machine Learning decision support tools that make it easy for employees to understand all of their options, which plans and coverages are the best fit, and how much it will all cost.

DecisionIQ

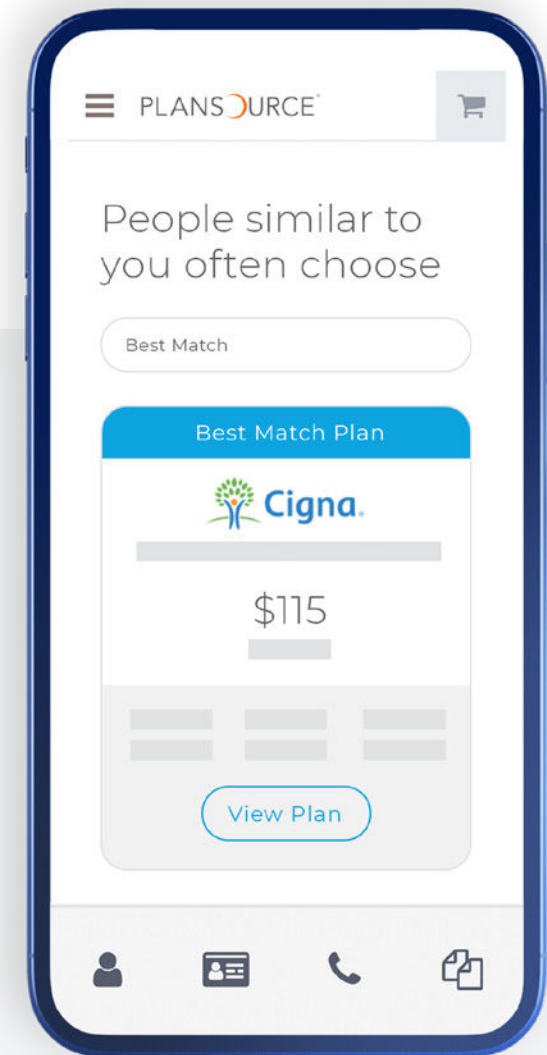
OUR PRESCRIPTIVE, AI-BASED DECISIONS ENGINE

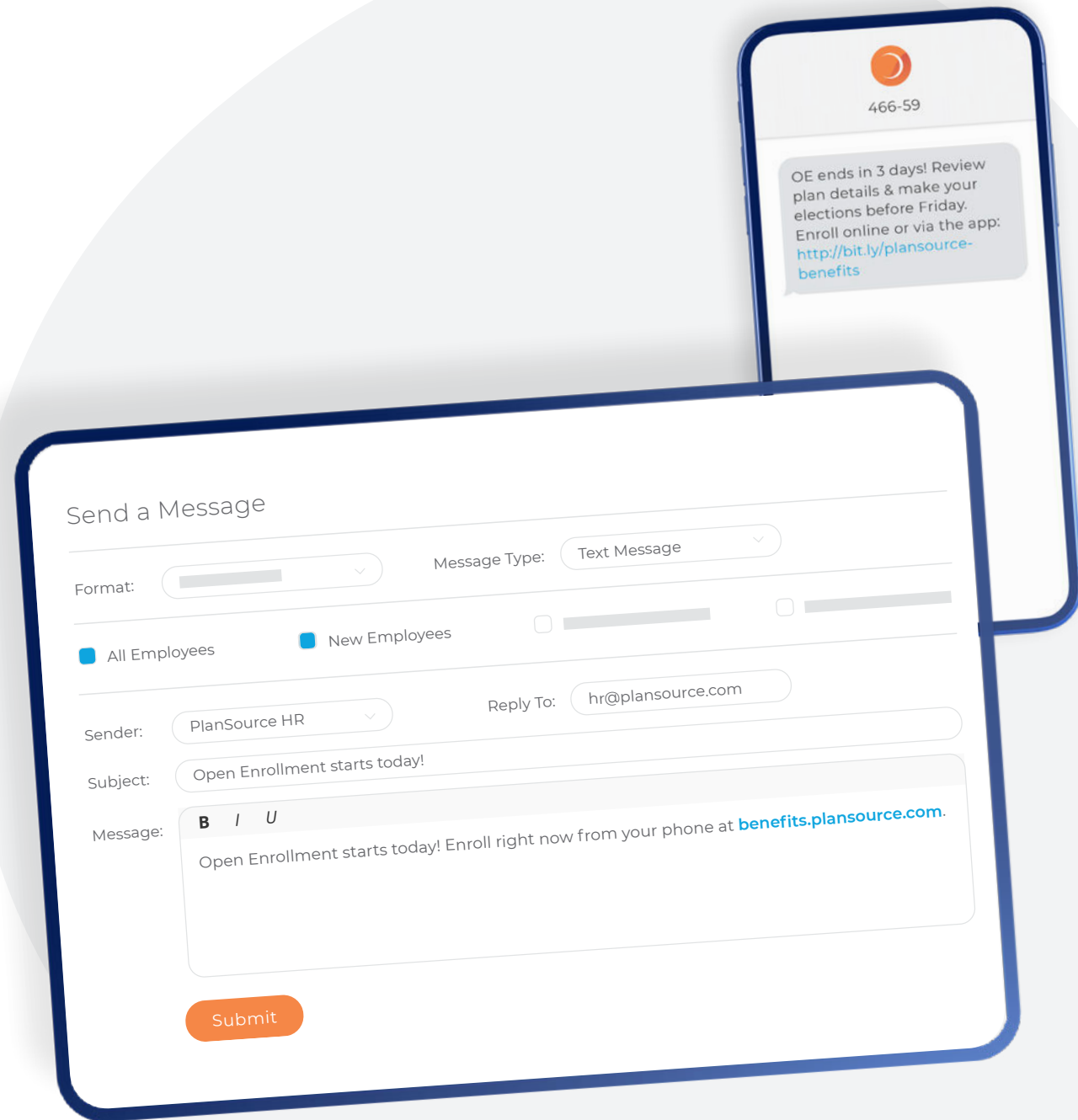
With DecisionIQ, employees receive intelligent, personalized guidance for all types of benefits, so they can navigate complex choices with ease. Our AI and Machine Learning-based models use demographic, dependent, eligibility, risk-tolerance and regional cost data to offer hyper-personalized suggestions for best-fit plans and coverage amounts.

ALEX by Jellyvision

A ROBUST, CONSULTATIVE BENEFITS ADVISOR

PlanSource has teamed up with Jellyvision to bring ALEX – its interactive benefits counselor - right into the shopping and enrollment experience. ALEX’s personalized guidance helps employers and their employees save money on premiums and reduce their healthcare costs using a precise blend of subject matter expertise, behavioral science, and plain English.





Communicate Like a Pro

To help your employees make informed benefits choices, clear and concise communication is vital. PlanSource makes the job of communicating easy with email, text, educational tools and in-system messaging.

- Create unlimited campaigns
- Specify your target audience
- Test, schedule and track your communications

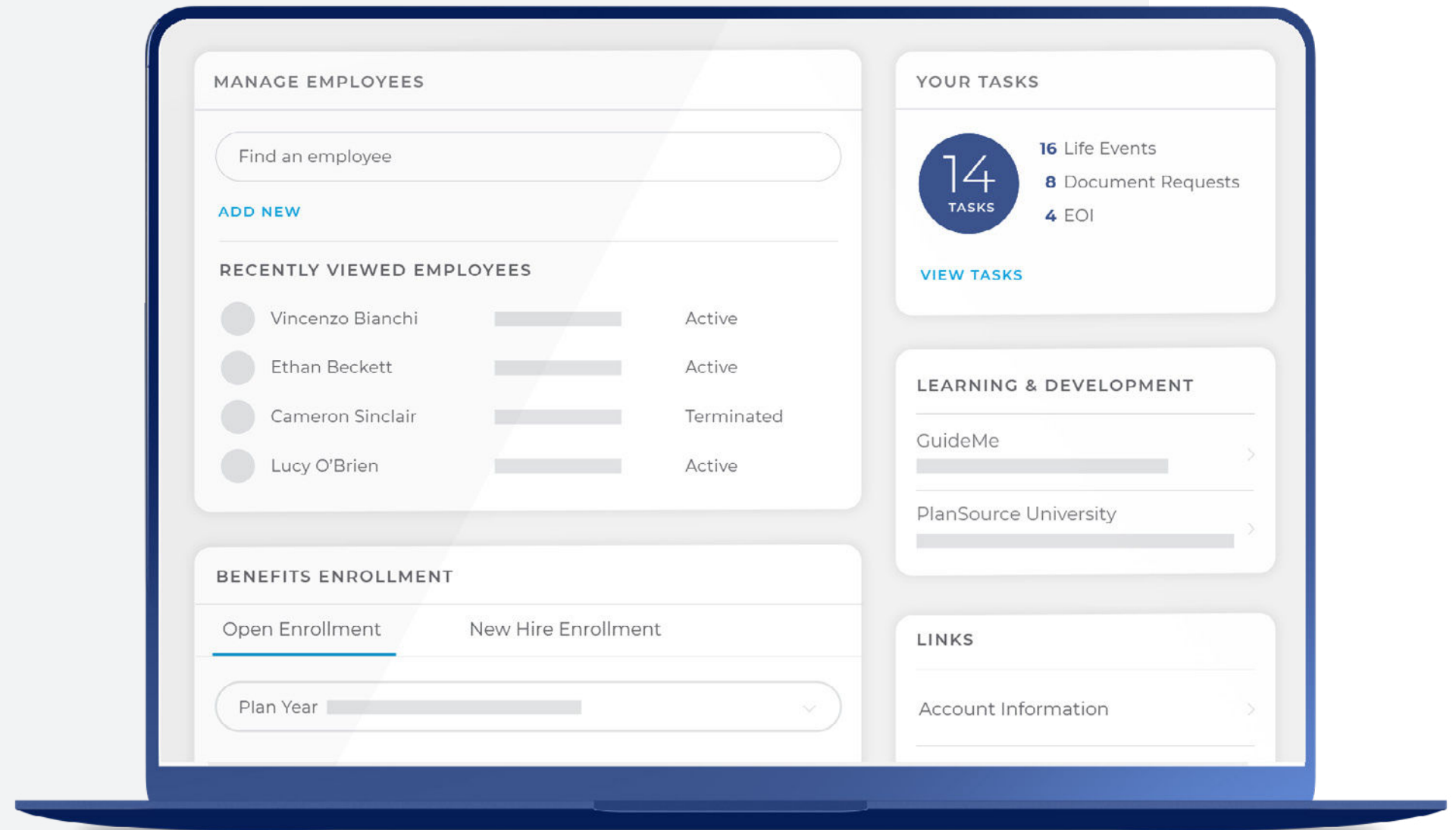
We know employees are barraged with emails and that many important messages get missed. That's why our tool allows HR teams to combine email and texts to expand the reach and effectiveness of their messaging.



An Admin-Free Administrative Experience

So you can spend time on what matters

Managing employee benefit programs and compliance is incredibly time-consuming and complex. Companies need technology to facilitate employee education and communication, manage eligibility, automate enrollment, manage carrier billing and adhere to ACA requirements. PlanSource provides HR teams with one technology platform to efficiently manage all aspects of their benefits programs.





With Features that Matter for HR Teams



ACA MEASUREMENT AND REPORTING

Whatever the ACA turns into, you will still need to follow its rules and requirements. We worry about staying compliant, so you can worry less.



COST CALCULATIONS

Calculate employee and employer contributions to premiums, and automatically transmit deductions to your payroll system for accurate processing.



ELIGIBILITY MANAGEMENT

Configure benefits for complex organizational structures and employee groups, including business rules for waiting periods, coverages, age restrictions and EOI.



BILLING RECONCILIATION

Generate consolidated self-bills and reconcile carrier-provided bills based on carrier-specific rules for billing and mid-month changes.



CUSTOMIZABLE REPORTING

Leverage a suite of built-in best practice reports or create custom reports that can be generated automatically to meet your needs.



DOCUMENT MANAGEMENT

Automate the process of verifying eligibility docs with AI-based technology that automatically reviews and approves employee documents.



Automate Your Most Complex Benefits Programs and Business Rules

WORKFORCE POPULATIONS

Define your company's employee groups where rules vary

COST CONTRIBUTIONS

Designate employee and employer contributions to benefits premiums

AUTOMATED ENROLLMENT

Enroll employees in company-sponsored benefits by default

AUTOMATED CANCELLATIONS

Set up rules to cancel benefits automatically

CONTINGENT BENEFITS

Automate enrollment dependencies such as eligibility for HSAs and spouse life maximums

EOI PROCESSING

Receive automated decisions from carriers for Evidence of Insurability requests



Reduce Costs with AI-Driven Eligibility Verification

Every company has unique rules for benefits documentation: what documents are required, who needs to supply them, when they are needed and in what form. Whatever your rules are, DependentIQ can help you automate the process of verifying eligibility during initial benefits enrollment, open enrollment and life events.

HOW DEPENDENTIQ WORKS FOR A MARRIAGE

STEP 1: NOTIFICATION

After creating a new marriage life event, the system notifies the employee she needs to upload a marriage certificate.



Notification

STEP 2: DOCUMENT UPLOAD

When it's convenient, she can upload the certificate by snapping a photo from her phone and adding it to PlanSource.



Document Upload

STEP 3: AUTO-VERIFICATION

Our powerful DependentIQ AI/ML technology automatically scans the document and instantly approves the spouse's benefits enrollment.



Instant Verification

MARRIAGE
LIFE EVENT

STEP 4: UPDATES/TRACKING

The employee is notified immediately that the marriage certificate is approved. HR can review any exceptions or docs that weren't auto-approved.



Updates and Tracking



A Complete Solution for ACA Compliance

Keeping up with the Affordable Care Act's complex and often-changing requirements has proven to be a big burden for already over-extended HR teams. Ensuring accurate measurement and reporting takes a lot of time and data from different employee systems.

And it's a task that's only getting more complicated as more and more states pass their own reporting rules. Our complete ACA solution for both federal and state reporting automates these processes to keep you compliant every step of the way.

How PlanSource Ensures End-to-End ACA Compliance



IMPORTS

hours from payroll



MEASURES

employees for eligibility



NOTIFIES

administrator of eligibility changes



GENERATES

forms 1094-C and 1095-C



DISTRIBUTES

forms to employees



TRANSMITS

forms to the IRS and state agencies



Better Analytics for Better Benefits ROI

Run all of your benefits administration reporting out of one powerful place. With PlanSource, HR teams can create, schedule and customize reports 24/7 – like employee and dependent census reports to enrollment rosters and work status change reports – to help oversee and optimize their benefits program performance and costs.

With InsightsIQ, groundbreaking analytics dashboards identify trends in your data and benchmark it against our active customer database of approximately 200 million employee and dependent benefit elections. See how you compare to your peers, and see trends in benefit participation, average costs, enrollment statistics and other insights like never before.

POPULAR BENEFITS REPORTS:

- Benefit Changes
- Confirmation Statements
- Dependent Enrollment
- Employee Census
- Employee Enrollment
- Employee New Hires
- Employee Terminations
- Evidence of Insurability
- Incomplete Enrollment
- Life Events
- Overage Dependents
- Payroll Deduction

Enrollment and Premiums

\$1,231,989

Total Premium

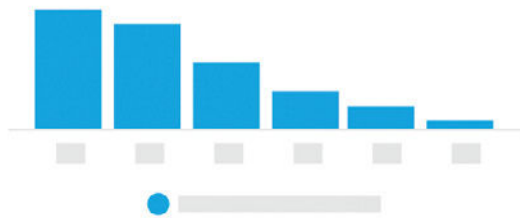
2,741

Total Enrolled Employees

PREMIUM SHARE ACROSS AGE TIER



TOTAL ENROLLED ACROSS AGE TIER



PREMIUM SHARE BY GENDER



TOTAL ENROLLED BY GENDER

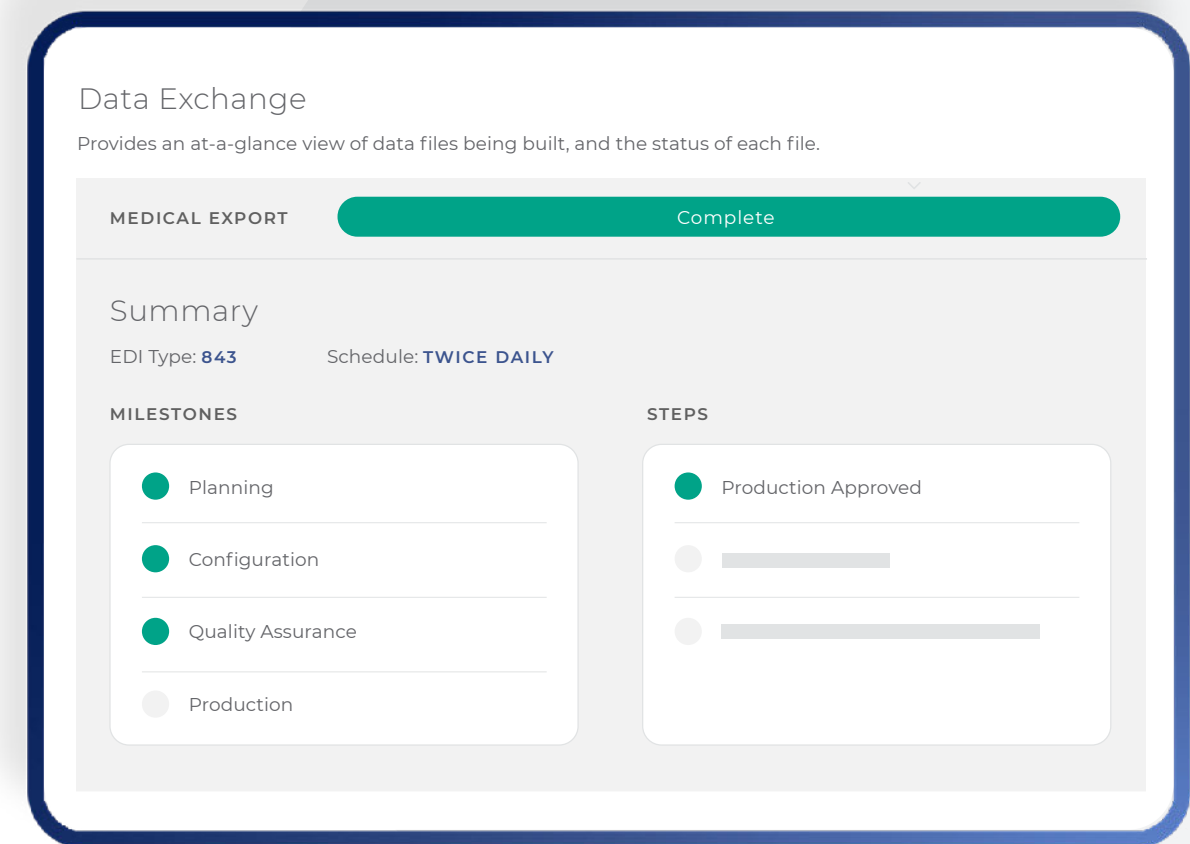


Connect Benefits Data to the Rest of Your Business

Connecting your benefits data to insurance carriers, payroll providers and other third-party administrators is crucial to efficient and effective benefits management. PlanSource offers real-time API and data integrations with more than 800 systems and have more than 28,000 live data connections. By automatically syncing your ben admin system and data with other core business systems, you're able to cut down on errors and manual effort that can cause delays in coverage.

REAL-TIME APIS INCLUDE:

- Employee Demographics
- Benefits Plans and Rates
- Beneficiaries and Dependents
- Evidence of Insurability
- Payroll Deductions
- Single Sign On
- And More!



“Being able to integrate our HR and payroll with PlanSource has made the experience really seamless for our employees, and it’s cut down immensely on administrative time.”

– ANDREA EVANTER, SVP, HUMAN CAPITAL, THE CORE GROUP

Guided Renewal

Employee Open Enrollment [01/01/2022 to 12/31/2022](#)

ABOUT

Placeholder text for the ABOUT section.

OTHER CHANGES

Placeholder text for the OTHER CHANGES section.

[Contact Support](#)

BENEFITS & PLAN YEARS

- Plan Year*
- Carrier Changes*
- Benefits
- Plans
- Costs

TESTING & GO LIVE

- Validate Changes*
- Support Team Review*
- Test Employees*
- Review and Submit*

A Smarter, More Streamlined Benefit Renewal

Our Guided Renewal Experience builds on years of research and uses smart defaults, artificial intelligence and data-driven metrics to drastically simplify the renewal process. We are still there to help as needed, but the automated workflow empowers HR teams to manage the renewal process on their own.

20-40%

**TIME SAVED WITH GUIDED
RENEWAL EXPERIENCE**



Partners

**STRONG PARTNERSHIPS AND CONNECTIONS
WITH YOUR BENEFITS ECOSYSTEM**



Strong Industry Partnerships at Every Step

PlanSource partners with stakeholders across the employee benefits lifecycle to bring you maximum efficiency and peace of mind. We have longstanding relationships with leading insurance carriers, benefit providers and more than 500 national and regional brokerage firms.



BOOST

Through our groundbreaking Boost program, PlanSource has partnered with leading insurance carriers to create the customer experience of the future. Real-time API integrations reduce setup time for HR teams and provide a consumer-friendly shopping experience.



BROKERS

PlanSource partners directly with brokers to provide best-in-class benefits technology to their customers. PlanSource provides preferred pricing and won't compete with you by taking broker commissions. Many of our brokers also become resellers that implement and support customers directly on the platform.



MARKETPLACE

We've developed a curated list of strategic partnerships to provide a seamless experience across your entire HR benefits ecosystem. These pre-established integrations and benefit add-ons are designed to maximize HR efficiency, employee engagement and plan participation.



Modernize Your Benefits Experience with PlanSource Boost

The benefits industry is filled with time-consuming processes that result in discrepancies, timing issues and administrative burdens. Meanwhile, consumers expect an intuitive, familiar benefits shopping experience.

That's why PlanSource has set out to revolutionize the benefits industry and create the customer experience of the future with simplified billing, an optimized consumer experience and modern, real-time API integrations with leading insurance carriers.

The Basics of Boost

MODERN API INTEGRATIONS

Real-time integrations between Boost carriers and PlanSource deliver instant data syncing and a better customer experience for plan configuration, enrollment and more.

SIMPLIFIED SELF-BILLING

Boost eliminates the need to reconcile carrier bills. You'll receive one bill for each Boost product; you pay us, we'll pay every carrier on your behalf.

OPTIMIZED SHOPPING

From automated workflows to customized benefits education content, we partner with carriers to provide an optimized shopping experience that's designed to drive engagement.

PREFERRED PRICING

Forget confusing and hard-to-manage credit programs. With Boost, discounted pricing is simple. Choose at least one qualified Boost product line, and receive preferred pricing on PlanSource.

Meet Our Boost Partners





Real-Time API Integrations for a Real-Time World

One of the most difficult aspects for HR teams setting up and managing benefits is integrating data from their systems with carrier systems. In some cases, data is only updated once a week using batch files, which can cause timing issues and leave employees without coverage.

PlanSource and Boost partners are streamlining integrations by developing APIs that will drastically simplify processes within four areas: plan configuration, enrollment, integration with carrier resources and evidence of insurability.

PLAN CONFIGURATION API

Automates the setup and renewal process by automatically syncing benefit plans, features and rates to drastically reduce setup time and eliminate errors.

ENROLLMENT API

Real-time API to send enrollment transactions directly to insurance carriers, eliminating batch EDI files and data discrepancies that can cause delays in coverage and hours of administrative work.

PROVIDER DIRECTORY AND MEMBER PORTAL

Integration with carrier resources allows employees to access carrier provider directories and member portals from benefits shopping workflows for a seamless, personalized experience.

EVIDENCE OF INSURABILITY API

Enables employees to easily complete EOI questionnaires within the online benefits shopping experience and decisions are automatically updated in PlanSource.

A Completely Automated EOI Process Everyone Benefits From

Managing Evidence of Insurability is a time-consuming yet extremely important task. Get it wrong, and plan participation can suffer or, worse, employees risk thinking they have coverage they don't. HR teams have historically spent hours managing a largely manual process that involved paper forms, chasing down employees and fax machines (remember those?). With Boost, those days are over.

EASY FOR EMPLOYEES

- Employees can complete the entire process of enrolling and filling out required EOI forms all within the benefits shopping experience
- At checkout, employees answer EOI questions online which increases completion rates
- EOI forms are quick to submit and quick to get approved by the carrier

AUTOMATED FOR HR TEAMS

- The EOI decision from the carrier is transmitted to PlanSource automatically, triggering notifications to HR and the employee
- EOI decisions are automatically updated with status, amounts and effective dates
- HR teams have full visibility and can monitor and audit the entire EOI process

Featured EOI Partners



Marketplace Partners

Today, more than ever, employees need more benefit options from their employers to have a well-rounded offering. PlanSource has curated a list of strategic partners to provide a seamless experience across your entire benefits ecosystem. These benefit add-ons, with efficient product implementations, are designed to maximize HR efficiency, employee engagement and plan participation.

The Basics of the Partner Marketplace

QUICK IMPLEMENTATION

through out-of-the-box
template builds

TEMPLATED FILE DELIVERY

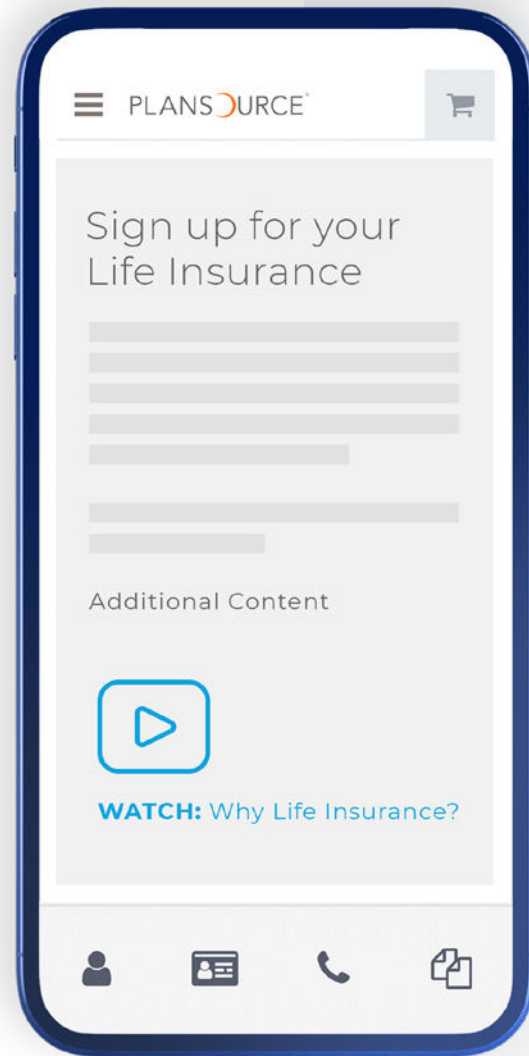
for expedited data exchange

EMPLOYEE SHOPPING EXPERIENCE

with optimized page content
to drive engagement

Featured Partners





A Shopping Experience That's Optimized for Engagement

Even though benefits represent a major expense for most families, employees spend little time enrolling. In fact we've found that employees spend on average only 18 minutes shopping for their benefits.

With PlanSource Boost, our consumer marketing experts optimize the shopping experience to create the best environment for employees to enroll in their benefits. Knowing that time is of the essence, we include educational materials, tips and best practices from Boost partners right in the shopping experience.

Add-On Services

**FREE UP YOUR HR TEAM TO FOCUS
ON THE BIGGER PICTURE**



Add-On Services

PlanSource Benefits Services provide value to HR teams that are consistently being asked to do more with less. HR teams are often understaffed and overworked relative to their role and impact to a company. To assist with this burden, our services provide relief by performing benefits administration tasks, so your team can focus on more strategic priorities.

PREMIUM
BUNDLE



Benefits Outsourcing



Employee Contact Center



Billing Reconciliation and Payment



COBRA Administration



HSA / FSA / HRA Administration



Dependent Verification



Employee Communications



1

2

3

4

5



Select the Services Package That's Right For Your Team

	PLANSOURCE PLUS Software + Optional Add-Ons You administer your benefits, we help when you need us.	PLANSOURCE PREMIUM Full Benefits Outsourcing You make the decisions, we manage the details.
Benefits Software	Included	Included
Benefits Administration <ul style="list-style-type: none"> • Benefits configuration and maintenance • New hire, life event, work status and EOI processing • Data integration operations, discrepancies and auditing • Eligibility management and resolution • QMCSO processing (add-on) 	Managed by Customer	Outsourced to PlanSource
Employee Contact Center	Add-On	Included
Billing Reconciliation and Payment Services	Add-On	Included
COBRA Administration	Add-On	Included
HSA/FSA/HRA Administration	Add-On	Add-On
Initial + Ongoing Dependent Verification	Add-On	Add-On
Leave of Absence or Retiree Billing (Available only with COBRA Administration)	Add-On	Add-On
Custom Employee Communications	Add-On	Add-On



Premium Benefits Outsourcing

Do more with less

With Premium Benefits Outsourcing, PlanSource is an extension of your HR team. We administer all aspects of your benefits program – from new hire and life-event processing to integrations with your insurance carriers and payroll systems. Outsourcing allows you to control costs, minimize risk and focus on your business, while we focus on managing your employee benefits and procedures.

WHAT SERVICES ARE INCLUDED?

- Benefits Configuration and Maintenance
- New Hire, Life Event and EOI Processing
- Data Exchange Operations, Auditing and Reconciliation
- Eligibility Management and Urgent Coverage Resolution
- Billing Reconciliation and Payment Services
- COBRA Administration
- Branded Employee Contact Center
- Open Enrollment Configuration and Management



Employee Contact Center

Don't call HR, call PlanSource

Let's face it – employee benefits are complex, so it's no surprise that employees need help. That's why we believe that one of the most important things we do at PlanSource is to provide an employee contact center. We'll educate your employees and help them get enrolled in the right benefits and plans for themselves and their families.

LOGIN ASSISTANCE

Passwords get lost and security questions are forgotten – but fear not, we're here to help. In fact, it's one of the most common questions we get.

"HOW DO I?" QUESTION

Your enrollment system is intuitive and easy to use, but that doesn't mean help isn't needed sometimes. We're happy to help when you need it.

BENEFITS HELP

Whether help is needed to select, understand or correctly use the products that have already been selected, we have a staff of experts waiting on call.



HOURS

8 a.m. - 11 p.m. ET
Monday - Friday



CONTACT METHODS

Phone
Live Chat

AT A GLANCE

- 100% of inbound and outbound calls are recorded
- English and Spanish-speaking representatives
- Translation services offered for 180+ languages
- Custom branding and toll-free numbers available



Billing Reconciliation and Payment

Eliminate time-consuming monthly reconciliations

Reconciling and paying carrier bills is a tedious and time-consuming process. Our Billing Reconciliation and Payment Service takes care of it from end to end, giving you more time to focus on higher-value activities.

SAVE TIME

Let someone else sync up the bills to ensure correct payments

REDUCE STRESS

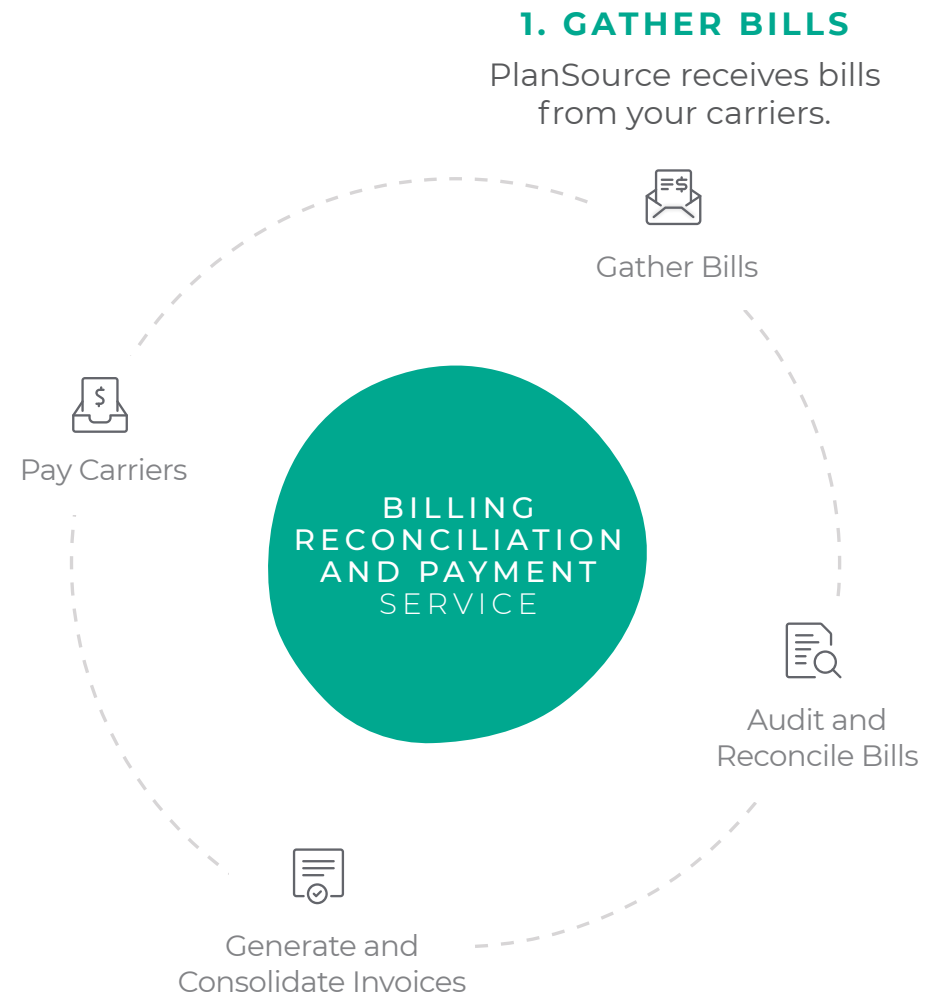
Stop tedious comparisons between enrollment and carrier records

MINIMIZE RISK

Ensure premium payments are made and discrepancies are resolved

4. PAY CARRIERS (OPTIONAL SERVICE)

You submit the grand total to PlanSource, and we remit premiums directly to carriers.



COBRA Administration

Outsource your most time-consuming tasks for more strategic HR focus

We can handle the full cycle of COBRA administration responsibilities, so you don't have to worry about staying compliant or being subject to penalties. We audit participants for accuracy using employee data from the PlanSource system and assume premium collection, monthly remittance, eligibility management and issue resolution with the carriers on your behalf.

REDUCE RISK

Manage risk more effectively with proven best practices

STAY FOCUSED

Trust an industry leader and expert technology so you can stay focused on your business

ENSURE COMPLIANCE

We manage all of the compliance requirements on your behalf



SEND NOTICES

Generate notices based on qualifying events



PROCESS PAYMENT

Process elections and payments from beneficiaries



BILL ENROLLEES

Bill enrollees and provide reporting and auditing



REINSTATE COVERAGE

Add COBRA coverage and manage the eligibility timeline



ANSWER QUESTIONS

Address participant questions with our contact center



MANAGE OE

Handle open enrollment and all future notice requirements



HSA/FSA/HRA Administration

Tax-advantaged account administration with lots of benefits

Benefit accounts – also known as Consumer-Directed Healthcare (CDH) accounts – allow pre-tax money to be set aside for eligible expenses that might not be fully covered under traditional health plans.

PlanSource offers fully managed tax-advantaged benefit accounts, including Health Saving Accounts (HSAs), Flexible Spending Accounts (FSAs) and Health Reimbursement Accounts (HRAs) that add value to your benefits program and reduce your payroll tax obligations.

What's Included in the Service?

ONLINE REIMBURSEMENT

Request reimbursement and provide receipts

MOBILE APP

Manage accounts and submit reimbursement requests

BENEFIT MASTERCARDS

Use one MasterCard for all benefit accounts

EDUCATIONAL TOOLS

Calculate tax savings and access list of eligible expenses

ONLINE ACCOUNT MANAGEMENT

View account balance and transaction history

CONTACT CENTER ASSISTANCE

Get answers to questions about card status, reimbursements and more

DEPENDENT MASTERCARDS

Request additional cards for eligible dependents

ONLINE FSA/HSA STORE

Purchase items at a discounted price with FSA and HSA dollars

INCREASE EFFICIENCY

We'll create and manage employee accounts for you, so your team gets more time back in their day

IMPROVE DATA ACCURACY

PlanSource will ensure that benefit account data is synced with your employees' accounts

PROVIDE A GREAT EMPLOYEE EXPERIENCE

Benefits experts will answer employee questions about their accounts



Dependent Verification

Verifying eligibility decreases benefits costs and improves compliance

Dependent verification is a best practice in employee benefits. By ensuring that only eligible participants are receiving coverage, you can save money and stay compliant. PlanSource offers full and ongoing dependent eligibility verification. PlanSource manages the process from end to end on your behalf, and our AI-powered document verification technology automatically reviews employee documents in real-time during enrollment and during post-enrollment audits.

SAVE MONEY

Reduce medical premiums for fully-insured plans and claims costs for self-insured plans

IMPROVE COMPLIANCE

Improve compliance with your Summary Plan Descriptions (SPDs), HR policies and rules

MINIMIZE RISK

Reduce stop-loss exposure and litigation risk related to ERISA, Sarbanes-Oxley and other regulations

HOW A TYPICAL FULL AUDIT WORKS

4 Weeks

PLANNING AND IMPLEMENTATION



PlanSource works with you to develop an audit plan and comprehensive communications strategy.

11 Weeks

LIVE AUDIT PERIOD



Employee documentation such as birth and marriage certificates are automatically reviewed and verified by our DependentIQ technology. PlanSource will review and manage any exceptions.

2 Weeks

POST-AUDIT WORK AND CLEAN UP



PlanSource handles the appeals process and updates enrollments, removing any ineligible dependents.



Custom Employee Communications

Maximize Engagement with More Effective Communications

PlanSource gives you everything you need for communicating with your employees about benefits. With a team of communication experts, PlanSource will help you create a strategy that is tailored to the needs of your various employee groups. When employees have a better understanding of the benefits you offer them, they have a stronger connection with your company. Leave it to PlanSource to conquer your specific challenges to ensure stellar communications that bring the right information at the right time to the right people.

HOW WE CAN HELP

PlanSource can provide consultation, professional design, and printing and fulfillment for all your employee communications.

- Benefits Websites
- Benefits Guides
- Custom Videos
- Infographics, Posters and Postcards
- New Hire and OE Packets
- Total Compensation Statements



Customer Experience

**COMMITTED TO CREATING WILDLY
SUCCESSFUL CUSTOMERS**



Your PlanSource Launch Journey

A proven framework for a successful implementation experience

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

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

– SARAH DARE, BENEFITS COORDINATOR,
BLOOMFIELD HILLS SCHOOL DISTRICT



FASTER TIME-TO-VALUE

Our structured approach and detailed project plan ensures everyone stays on track, on time and updated for a smooth Launch, from kickoff through go-live.



HIGHER ADOPTION

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



MAXIMUM EFFICIENCY

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



SCALABLE GROWTH

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



Launch Journey

The Right Approach

Developed from thousands of successful implementation projects, the PlanSource Launch Journey applies a consistent, structured approach and defined stages to your specific business and benefits requirements.

1

COUNTDOWN

In this phase, you'll start learning the system, and we'll gather all the info we need about your benefits to prepare for Lift-Off.

2

LIFT-OFF

Your Project Manager will conduct a kickoff meeting and lead a discovery where we'll discuss your requirements and agree on your launch style and timeline.

3

REQUIREMENTS

We'll work with your team to document all of your unique business requirements, workforce configuration and eligibility rules in detail.

4

CONFIGURATION

Next, our specialists will help set up your system and put it through a comprehensive inspection before handing off to you for final testing.

5

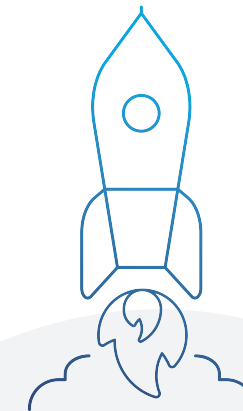
AUDIT & TESTING

Finally, your team will be able to walk through the entire system using test employee data to make sure everything is exactly how you want it.

6

ORBIT

All systems go(live)! Your training is complete, and your data is now syncing with your insurance carriers and other partners.



The Right Team

You'll have an entire team behind you to ensure your team and your platform are set up for success. Launch roles include:

TRANSITION SPECIALIST

PROJECT MANAGER

BENEFITS COACH

CONFIGURATION ANALYST

EDI ANALYST



LEARN MORE AT [PLANSOURCE.COM/LAUNCH](https://plansource.com/launch)



Ensuring Your Ongoing Success

Creating wildly successful customers is one of our company's core values, and our Customer Success organization lives and breathes this every day. We realize not every team's needs are the same, so we offer three flexible options to ensure you get the right level of service your team needs to be successful.

“Our Customer Success Manager works tirelessly and is readily available. During COVID I had to figure out how to furlough 5,000 employees and update their benefits. She went above and beyond and is by far the best I have ever worked with.”

– TAMMY VALLE, HR DIRECTOR, THE MERUELO GROUP

“When looking for a software solution, we needed something that also has exceptional customer service. We didn't have time to raise an issue and have it wait 2-3 days for a response. And now, we don't have to.”

– JENN GAW, DIRECTOR OF HUMAN RESOURCES, DERMALOGICA



Extensive, On-Demand Learning to Maximize Your Success

Take control of your learning! PlanSource University is here to support your learning needs with a self-paced virtual experience that puts you in the driver's seat. Training content starts with the basics (think PlanSource Fundamentals 101) and grows in complexity based on your specific training needs and goals.

COURSES

Browse a full catalog of PlanSource courses to find just what you need. Courses include videos and articles on dozens of relevant topics.

LIBRARY

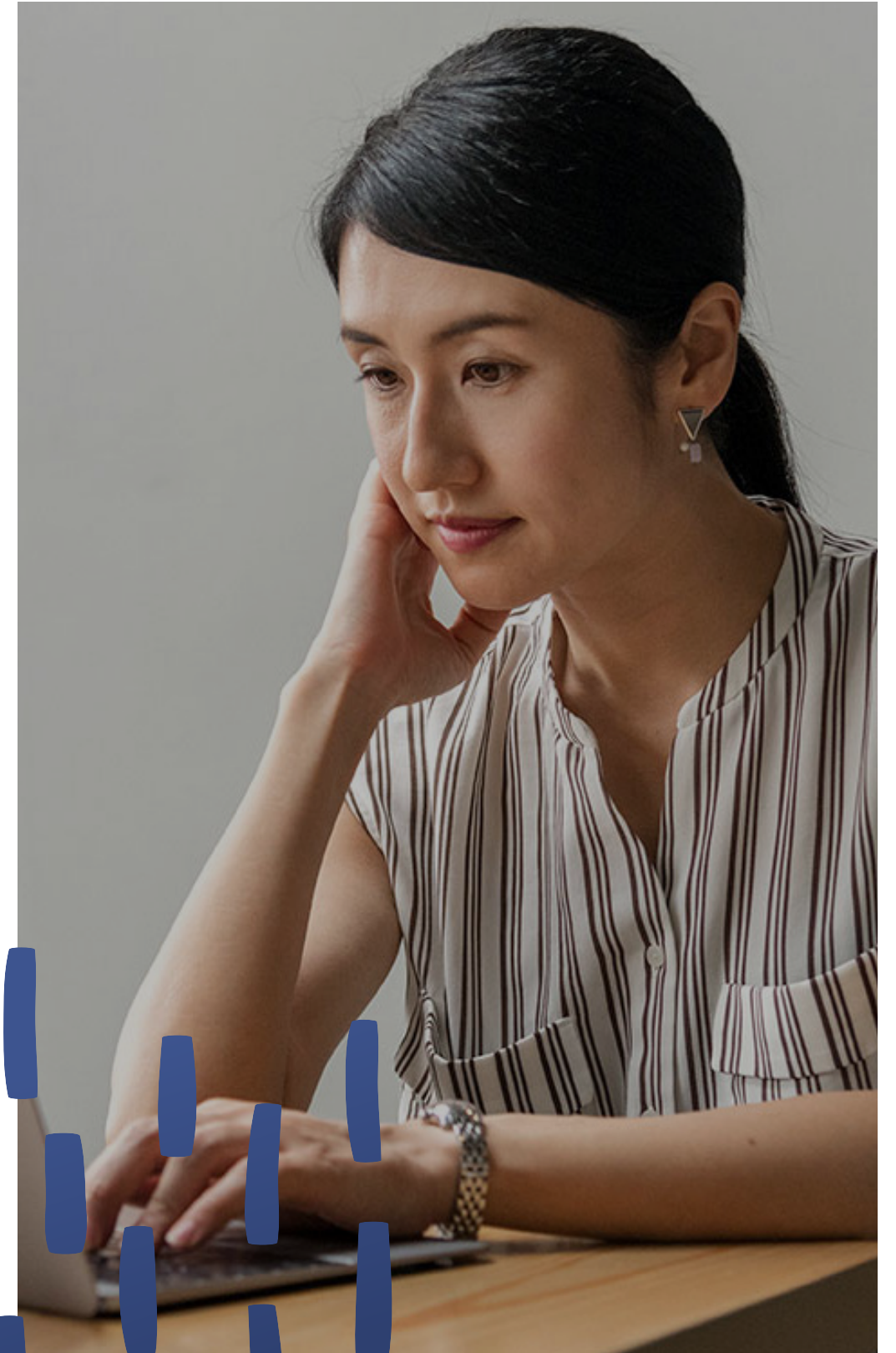
Peruse our collection of short, self-paced lessons that cover individual topics or tasks you want to tackle right away.

WEBINARS

Bolster your knowledge from the comfort of your home, office or even a park bench. Select from a previously recorded webinar or sign-up for a live session at a date and time convenient for you!

IN-PRODUCT WALKTHROUGHS

Access on-demand administrator training and self-paced walkthroughs directly within the PlanSource platform with GuideMe, our interactive, in-product help tool.



Flexible Service Options for Every Team

	ESSENTIALS	COMPLETE	VIP
	Best for small-mid-sized customers with straightforward benefits and low complexity	Ideal for medium-large customers that have more complex benefit needs and/or add-on services	Designed for large, complex customers that need a full team to provide a tailored, high-touch approach
PlanSource University	●	●	●
Community Forum	●	●	●
Idea Portal	●	●	●
Known Issue Tracker	●	●	●
Online Knowledgebase	●	●	●
Technical Support	Shared Team	Designated Technical Support Manager	Designated Technical Support Manager
Benefit Configuration Support	Shared Team	Designated Benefits Business Analyst as Needed	Designated Benefits Business Analyst as Needed
Integrations/EDI Support	Shared Team	Designated Data Analyst as Needed	Designated Data Analyst as Needed
Annual Benefit Renewal and OE Planning	Online Guided Renewal Experience with Support as Needed	Project Planning and Configuration for Annual OE	Project Planning, Consultation and Configuration for Annual OE
Proactive Consultation and Planning			Designated Customer Success Manager
Leadership Access	Defined Feedback Path to Management	Defined Feedback Path to Management	Designated Executive Sponsor

Continuous Product Innovation

We're constantly re-investing in our products and services to ensure you have the best benefits experience possible. Based on direct customer and partner feedback, extensive market research, and an eye toward 'What's Next?', PlanSource product releases deliver ongoing innovation and value to all customers.

We design and launch major software releases multiple times a year plus make smaller updates as needed to meet regulatory deadlines and provide timely enhancements to our customers. Communication is important, and we always keep our customers in the loop about what's coming to your PlanSource platform, through in-product notifications, emails and release webinars.

“I've been engaged with the PlanSource leadership team, Head of IT and Product, and I truly believe that where PlanSource is headed and their mindset will allow them to continue to rise to the top.”

– MARK RIEDER, HEAD OF INNOVATION, NFP



Serious About Platform and Data Security

Our clients and partners entrust us with sensitive benefits and health care data. We safeguard this information in every possible way, with procedures in place for data protection, standards for people and processes, audited security measures for all related equipment and facilities, and use of well-proven software security mechanisms.

ISO 27001

Certified

SSAE18 SOC 2 TYPE 2

Audited

HIPAA, GDPR, CCPA

Compliant

SANS TOP 20

Common Security Controls

Business Continuity

We have designed our technology infrastructure to minimize the effects of natural disasters and have business continuity plans in place to ensure that our solutions continue to operate and your data is safe.

- Amazon Web Services used for Disaster Recovery
- All data center facilities are equipped with redundant power grids, redundant generators, UPSs and redundant telecommunication trunk
- Primary data center located in Orlando, Florida in a Tier III Data Center
- AWS facilities located in Oregon and N. Virginia regions of the USA
- Data replication between data centers ensures both data centers have the same data
- Recovery time objective of 48 hours
- Recovery point objective of 4 hours (or less)
- Established and tested disaster recovery and business continuity plans

About PlanSource

PlanSource helps centralize and simplify every aspect of your benefits program, so employees and HR teams can make smarter, more confident benefits decisions. We believe the easier benefits are to understand, use and manage, the more value people get out of them. So we're on a mission to create the best benefits experience possible to do just that.



2008 FOUNDED



4 LOCATIONS



800+ TEAM MEMBERS



500+ BROKERS



3,500+ CUSTOMERS



5+ MILLION CONSUMERS



A VISTA PORTFOLIO COMPANY



Ready to
Get Started?

plansource.com/contact

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