



PLANSOURCE<sup>®</sup>

*One Source. Many Benefits.*

## Cosmos Elite Preview Webinar

*August 19, 2020*

# Today's Speakers



**Darren** Lucas  
*Product Manager*



**Ryan** Jepson  
*Product Manager*



**Danny** Atchison  
*Associate Product  
Manager*



**Cat** Miller  
*Director of Partner  
Marketing*

# Quarterly Releases

*Continuous investment and innovation*

## NEXT RELEASE



COSMOS

Sept. 10, 2020

## UPCOMING RELEASES



SIRIUS

Dec. 10, 2020

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

## POLL QUESTION



What is the #1 priority for your employer groups over the next 3-6 months?

# Cosmos Release Key Themes

*Updates Center Around Customer Feedback & 5 Major Benefits*



Streamlined  
Enrollment



Greater  
Self-Service



Better HR  
Efficiency



Easier  
Configuration



Virtual OE  
Success

## AGENDA

Employee Experience

HR Experience

PlanSource Boost

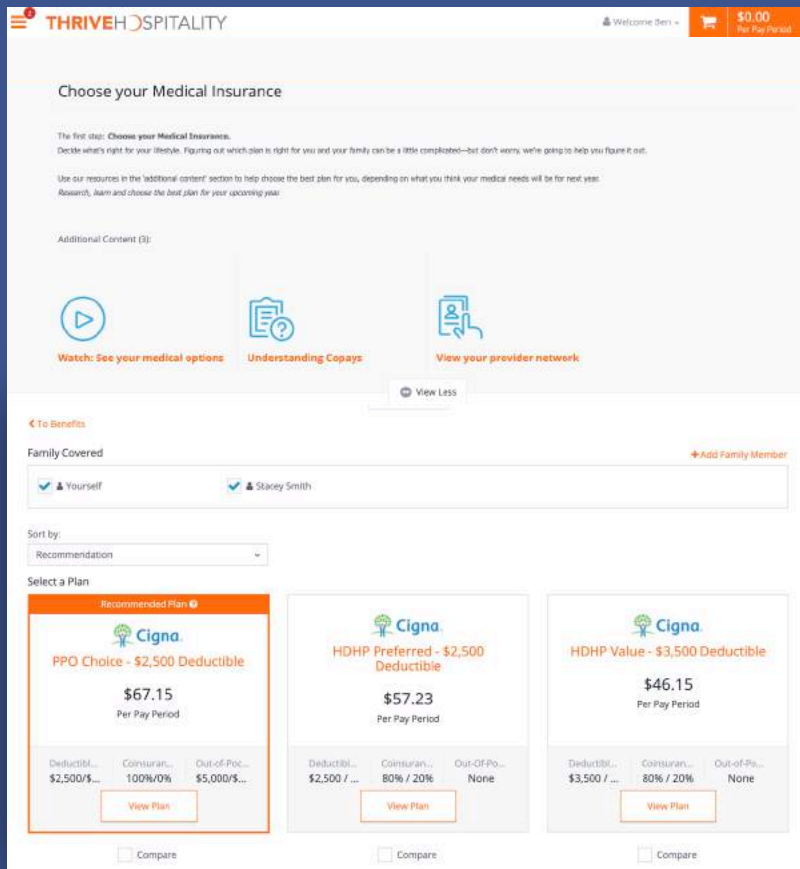
Marketing Updates

Wrap-Up & QA



# Employee Experience

*Streamlined Workflows to Simplify Benefits  
Decisions and Increase Enrollment Completion*



# Streamlined Enrollment Workflow

*Focused Design to Limit Distractions & Improve Understanding*

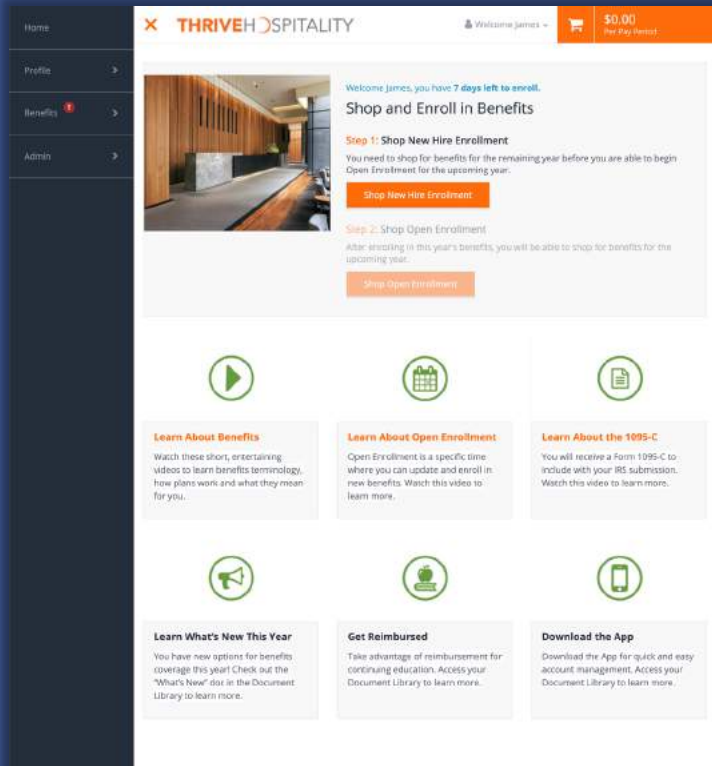
Navigation menu automatically minimizes when starting enrollment

Notifications alert employees to any outstanding tasks

Expanded educational content by default to improve understanding and decision confidence

Plan filters hidden by default unless 6 or more plans are available





## Improved Dual Enrollment

*Design Updates Improve Clarity & Increase Completion Rates*

Updated wording makes it clearer to employees that they have 2 enrollments to complete

Additional context provides a smoother transition from one enrollment to the next

THRIVE HOSPITALITY

Welcome james

\$77.53  
Per Pay Period

Watch: Why Life Insurance?

What's 'Evidence of Insurability?

How to select a beneficiary

View Less

Life Insurance: Voluntary Employee Life

← To Benefits

We recommend enrolling in \$200,000.00 in coverage. [Find out why.](#) [Personalize](#)

Select Coverage Amount

THE HARTFORD

\$100,000.00 (\$1.15)

THE HARTFORD

Voluntary Employee Life

\$1.15  
Per Pay Period

[Keep this Plan](#)

Beneficiaries [Edit Beneficiaries](#)

## Higher EOI Completions

*Updated Workflows to Simplify & Boost Completion*

Simple, user-friendly language to explain the EOI process

Buttons encourage employees to complete the survey right away

Employees can complete surveys at any time from the To-Do List

**THRIVE HOSPITALITY**

Welcome James

\$0.00  
Per Pay Period

Boost your financial protection even further with Voluntary Life Insurance. In addition to the coverage we offer for free, you can increase your life insurance payout by up to \$200,000 below. From end of life expenses, to mortgage, college tuition, and beyond, adding additional Life Insurance coverage can help your loved ones when they'll need it most.

Choose your additional benefit amount from the options below.

(Some amounts will require you to fill out an Evidence of Insurability form, but don't worry, it's easy)

[View More](#)

### Voluntary Employee Life

[← To Benefits](#)

We recommend enrolling in **\$200,000.00** in coverage. [Find out why.](#) [Personalize](#)

Select Coverage Amount

**Guardian** \$200,000.00 (\$36.92)

**Requires Approval**  
The amount of coverage requested requires you to answer a few short health questions (Evidence of Insurability) after checkout to be reviewed by Guardian Insurance.

You have requested coverage of **\$200,000.00**. Of this amount, **\$100,000.00** is subject to approval. If approved, your cost will increase by **\$18.46** for a total cost of **\$36.92**.

Pending Cost:	\$18.46 additional	Pending Coverage Amount:	\$100,000.00 additional
Per Pay Period:	pending	Approved Coverage Amount:	pending
Per Pay Period:	\$18.46	Approved Coverage Amount:	\$100,000.00

**Guardian**  
Voluntary Employee Life

**\$36.92**  
Per Pay Period  
[Requires Approval](#)

[Update Cart](#)

## Personalized Plan Recommendations

*Auto-Enabled for Voluntary to Expand Reach (Direct Only)*

Available today to all customers on all health and voluntary benefits products

Auto-enabled 8/27 for direct customers for:

- Accident
- Critical Illness
- Long-Term and Short-Term Disability
- Voluntary Life: *Employee, Spouse Dependent*

No additional plan details or set up needed

Can be turned on/off at the individual benefit level at any time

# HR Experience

*Streamlined Workflows to Simplify Benefits  
Decisions and Increase Enrollment Completion*

# Page Design Enhancements

## Configure New Hire Events

### Processor Settings

Stop Processor (Default) ☒ **Start Processor**

*Flip to 'start' to send the default reminder message daily to everyone that's not enrolled. It will continue to run until you stop it. You can edit the default message and schedule below.*

☐ Automatically close new hire enrollment event when enrollment is complete

Include Messaging (Optional) No ☒ **Yes**

Notify employee  days before a new hire is eligible for enrollment

### E-mail Attachments

No attachments

No file chosen

Total 0 B

Send Preview Email To:

## Process New Hires More Easily

*Finishing Beta Touches Allows You to Do More in Fewer Clicks*

Generate test emails

Add attachments to email templates

Ability to turn messages on or off

Choose to automatically close new hire events upon enrollment

Display enrollment start date by default, instead of SSN

# Brand New Employee Audit

Adds Key Power User Capabilities from Classic Experience

Easy access from the top Actions menu on the Employee Profile

Year-over-year changes highlighted

More comprehensive demographic details

New full-screen table view

Horizontal audit tables with empty columns hidden by default

Current Employee Record Hide History

Updated at ↓	Updated by user	Changed by	Created at	Created by	SSN
11/29/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/28/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/09/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/29/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/29/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/29/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/29/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334
11/29/2018 12:04:01pm	Munk, Erika	Employee EE_Level_Im...	11/29/2018 12:04:01pm	Munk, Erika	101-22-3334

# Guided Renewal



Have a question? Click here. 

Got It 

### WHY WE ASK

Each year at renewal a determination needs to be made as to whether a carrier file should copy as is, requires changes, is terminating, or should not copy to the new plan year. In the common questions below you will find information regarding the different values being displayed and the actions that can be taken.

### COMMON QUESTIONS

What is the comparison File Run Date?

What is the Current Plan Year Last File?

What is the New Plan Year First File?

What happens when selecting Requires Changes?

What happens when selecting Terminating?

What happens when selecting Do Not Copy?

## Faster Renewal Set Up

*Updated Workflows for a More Flexible  
& Robust Self-Service Experience*

Now enabled for most clients

More in-app help content

Faster page load times

Support for plans that don't use costs

*Admin Renewal Status* report now shows all renewals


Updated renewal notification emails, including de-branded notifications

**Final Review** Actions

Organization	Thrive Hospitality
New Plan Year	01/01/2019 to 12/31/2019
New Open Enrollment Dates	12/15/2019 to 12/30/2019
New Enrollment Method	Passive Enrollment

Comparison/Summary **Costs** Other Changes Carrier Changes

**Medical**

 Updated By: John Smith 09/02/2019 08:18:36 am

**Consultants**

Cost Group/ Coverage Level	Employee Monthly Cost	Employer Monthly Cost	Billing Fee	Billing Fee 2	Billing Premium
Employee Only	670.21	342.70	0.00	0.00	1012.91
Employee + Spouse	1615.37	453.07	0.00	0.00	2068.44

## More Comprehensive Renewal Summary

*Updated Design Provides Greater  
Confidence & Transparency*

Simple layout condenses comprehensive  
details into an easy-to-understand view

Year-over-year changes clearly  
highlighted, including:

- Detailed cost changes
- Which user made which changes
- When the changes were made

Access the summary anytime during  
renewal and for 120 days afterwards

# Premium Billing

Payment Accounts + Add Payment Account

Payment Accounts Configure Accounts Q

<input type="checkbox"/> Carrier Billing	Configured Payment Account
<input type="checkbox"/> Randy Carrier 1 & 2 Pop - Location 1 & 2	<div>Payment Account 24 XXXX06244</div>
Assigned Populations	Allow Per Population Payment Accounts Off <input checked="" type="checkbox"/> On
<input type="checkbox"/> Location 1 Population	<div>Payment Account 24 XXXX06244</div>
<input type="checkbox"/> Location 2 Population	<div>Payment Account 15 XXXX9615</div>

## More Payment Self-Service

*Added Options for Billing Reconciliation & Payment Self-Service*


Set up multiple active bank accounts and set one as default

Map billing statements, carriers and populations to different bank accounts

Role-specific information access and automatic change notifications for PlanSource Premium Billing team

# HSA Contributions

**Current Benefit** Coverage effective from 01/01/2018 to 12/31/2018

 Health Savings Account

\$383.00  
Per Pay Period

Select Your Contribution Amount

Total Annual Contribution  
**\$2,550.00**


Per Pay Period Contribution  
**\$106.00**

\$0.00

\$2,550.00

Annual Contribution

\$3,450.00

 **Maximize My Contribution**

Since your employer will contribute \$1,000.00, the maximum amount you can contribute is \$2,550.00\*

Annual Personal Contribution	Estimated Employer Contribution	Estimated Annual Contribution
<input type="text" value="\$2,550.00"/>	+	\$1,000.00
	=	\$3,550.00

**Personal Contribution:**  
Annual Employee Contribution of **\$2,550.00**

**Employer Contribution:**  
Estimated Employer Lump Sum contribution of **\$1,000.00** will be added on 01/14/2020.

## HSA Employer Lump Sums

*Manage Lump-Sum Contributions  
Directly through PlanSource*

Contribute to employee HSA accounts – a popular incentive for HDHP participation

Now available for early adopters

Data available through EDI files and Ultimate API

The screenshot shows a web interface for selecting HSA coverage. At the top, there's a section for "Select Coverage Level" with a button for "Employee Only". Below this is the "Select Your Contributions" section, which has two radio buttons: "Annual Contribution" (selected) and "Per pay period contribution". Under "Annual Contribution", there's a text input field for "Annual Personal Contribution" with the value "\$1200.00" and a link to "Maximize My Contribution". A note states: "The IRS maximum contribution amount for the 2020 plan year is \$3,550.00." Below this, a question asks "Would you like to make an additional type of contribution?" with a "Yes" button. A note says "You can make additional contributions from the options below:". At the bottom, there's a button labeled "Add One-time Lump Sum". To the right of the main form, there's a summary box for the "Health Savings Account" showing a contribution of "\$50.00 Per Pay Period", an "Update Cart" button, and a link to "Decline Health Savings Account Benefits".

## HSA Employee Lump Sums

*Allowing employees to utilize HSA funds earlier in the plan year*

When enrolling, employees can make an initial one-time contribution to their HSA, in addition to per pay period amounts

Contributions automatically stay below the IRS limits

HR admins can choose to disable lump sum contributions

*Now available for early adopters. Data available on EDI files, but not APIs yet*

## POLL QUESTION



Which of the following is most important to your employer groups regarding HSAs?



# PlanSource Boost Updates

*New APIs to Further Optimize Plan Configuration  
& Enrollment Experiences*

# Boost Updates Overview

*New Integrations & Enhancements Coming in Cosmos*



Enhanced Plan  
Configuration  
API Usability



New Real-Time  
Enrollment  
API



Expanded EOI  
Single Sign-On  
Integrations



New *Find a  
Provider*  
Directory



The image displays two overlapping screenshots of the Guardian web interface. The top screenshot, titled "Guardian Add Integration", prompts the user to enter a "Guardian Group ID" and a "FEIN" (510416377) to create a connection. The bottom screenshot, titled "Guardian Select Plans", shows a success message for the connection and a table of available plans. The table has columns for "Benefit", "Plan", and "Coverage Tier". Three plans are listed: "VLT - Voluntary Long Term Disability" (twice) and "Vision - VSP - Signature Full Feature". A sidebar on the right shows "Additional Enhancements" with a checked option "Find A Provider Directory". A bottom overlay shows a dropdown menu for "Apply Population to Selected" with options like "All Active FT Employees" and "All Employees".

**Guardian Add Integration**

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

Guardian Group ID

This may also be your Group Number. Ex. 00123456

FEIN

510416377

**Guardian Select Plans**

Success! You are now connected to Guardian.  
Organization: Plan Config (00508723)

Benefit	Plan	Coverage Tier
<input checked="" type="checkbox"/>	VLT - Voluntary Long Term Disability	Select
<input checked="" type="checkbox"/>	VLT - Voluntary Long Term Disability	Select
<input checked="" type="checkbox"/>	Vision - VSP - Signature Full Feature	4 Level: Emp, Emp+Spouse, Emp+Children, Emp+Family

**Additional Enhancements**

These will be enabled automatically for you, enhancing the overall employee enrollment experience.

☒ Find A Provider Directory  
Employees can look up doctors for Guardian insurance benefits directly within enrollment.

Apply Population to Selected:

All Active FT Employees

APPLY

## Simpler Plan Configuration

Added Functionality to the Guardian Plan Configuration API

Customize plan display names to avoid duplicates and improve clarity

If errors occur, easily check if you're pulling from the correct FEIN

Exclude certain plans from import

Batch-edit plan populations

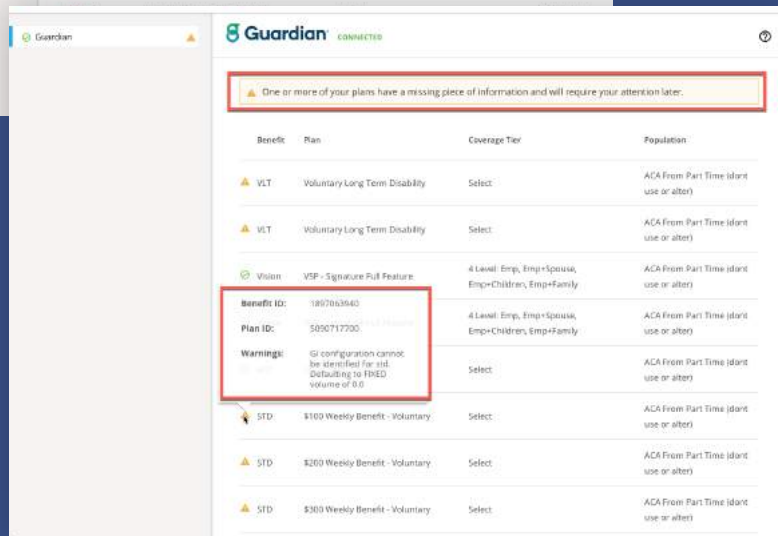
Restart Guardian integration process

Enable *Find a Provider* in Guided Renewal

BEFORE



AFTER



## Real-Time Data Validation & Visibility

*Added Functionality to the Guardian Plan Configuration API*

New warning alerts help you easily identify, understand and resolve issues

Icons highlight any discrepancies that need your attention

Hover-over functionality provides additional detail without having to navigate away from the page

**Search API Transactions**

Employee Name:  Employee Number:  Subscriber ID:

Transaction ID:  From Date:  To Date:

[Search](#)

**Search Results**

<input type="checkbox"/>	Employee Name	Employee Number	Subscriber ID	Transaction ID	Transaction Status	Date
<input type="checkbox"/>	Blmwood Tetra	1256654		758276	transmission failed	08/11/2020 13:42:13
<input type="checkbox"/>	Blmwood Tetra	1256654		757794	transmission failed	08/11/2020 13:47:00
<input type="checkbox"/>	Blmwood Tetra	1256654		757252	transmission failed	08/11/2020 13:47:00
<input type="checkbox"/>	Blmwood Tetra	1256654		756740	transmission failed	08/11/2020 13:46:50

**Transaction Details**

**General**

Transaction ID:	Recipient:	Status:	Created At:
758276	Guardian Insurance	transmission_failed	08/11/2020 13:42:13

**+ Employee**

**+ Dependents**

**+ Coverages**

[Download](#) [Close](#)

# Real-Time Enrollment

*Instant Data Transfer & Validation via the Guardian Enrollment API*

Real-time enrollment after checkout

Search for data transfers by date, employee or ID

See exactly what data was sent and received

Export enrollment API results to Excel

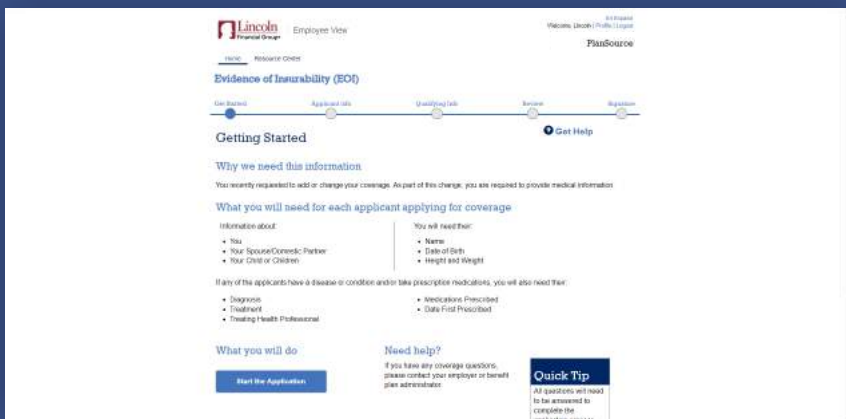
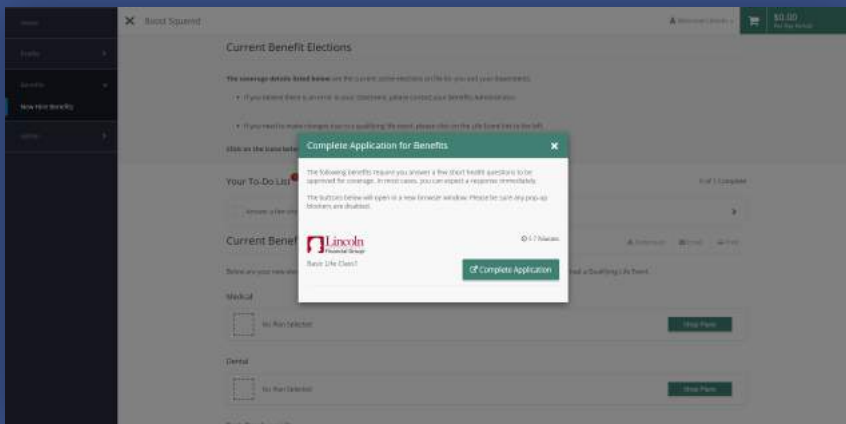
If an error occurs:

- Data will be automatically resent
- Users automatically notified about error and how to resolve it



## DEMO

Plan Configuration Enhancements &  
Enrollment API



## EOI Single Sign-On (SSO)









*Now available for Lincoln Financial Group for groups with >1,000 lives*

Eliminate extra steps and paperwork so employees can complete EOIs immediately

After enrolling, employees are taken directly to the Lincoln EOI form – no separate login needed

Supports Basic Life, Voluntary Life, Voluntary LTD & Voluntary STD

# EOI Integrations Provide the Best Experience

	Integrated Shopping Experience	Automated Decision Notification
	Available Now	Available Now
	Available Now*	Available Now
	Available Now (Early Adopters)	Future Release
	Coming Sept 2020 (1,000+ Employees - Cosmos)	Future Release
	Available Now (100+ Employees – Cosmos)	Available Now (100+ Employees)
	Available Now	Available Now
	Available Now	Future Release
	Available Now	Future Release



Boost Square

Please add your Primary Care Provider

This plan requires you to select a primary care provider for each family member enrolled.

MetLife Find a Provider - Dental

Family Member: JONATHAN A. ALVAREZ, DDS

Provider Name: JONATHAN A. ALVAREZ, DDS

Provider Network: Select

Find a Provider

Back Continue

## Instant Provider Search

*New "Find a Provider" Directory Integration Added for MetLife*

Employees can search for and select a MetLife dentist within the PlanSource shopping experience

Available for MetLife Dental PPO Plan

Also available for Guardian

Boost Square

Choose a Primary Care Provider

MetLife Find a Provider - Dental

JONATHAN A. ALVAREZ, DDS

9.5 miles

SALT DENTAL OF ORLANDO

811 S. ORLANDO BLVD. SUITE 100

ORLANDO, FL 32801

PHYSICIAN

General and Family Dentistry

Accepting New Patients

Select this provider for:

Next Step

Select Provider

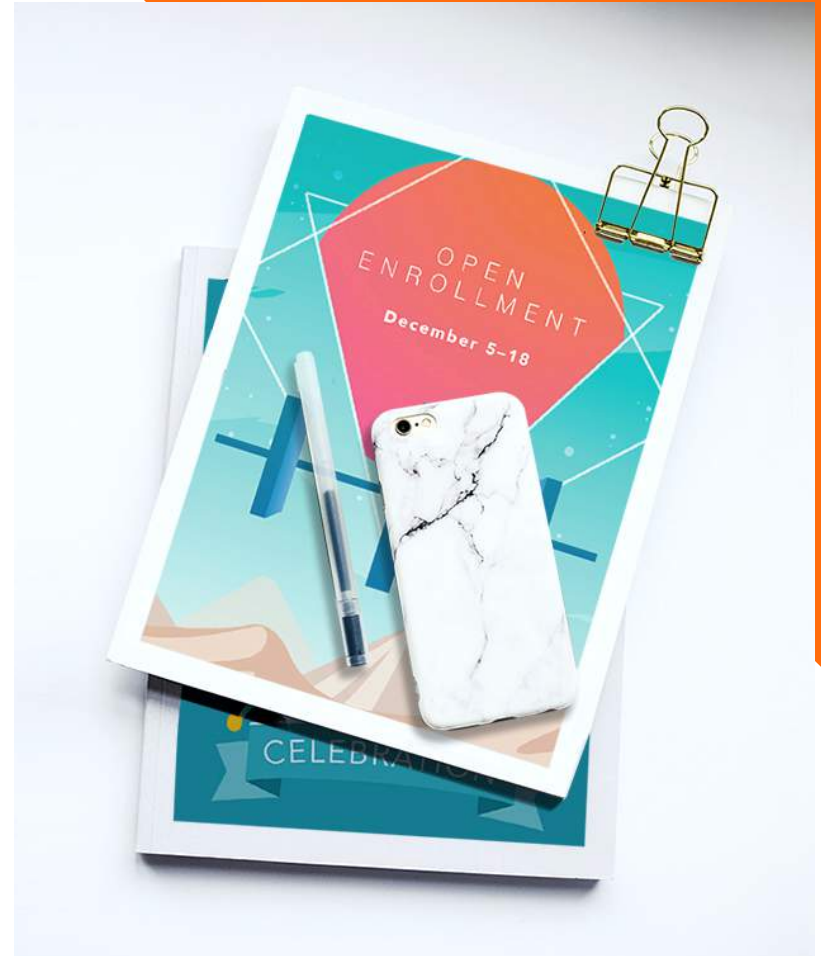
# Marketing Updates

*New Open Enrollment Resources to Help Employers  
Execute a Successful Virtual OE Experience*

# Free OE Digital Communications Kit

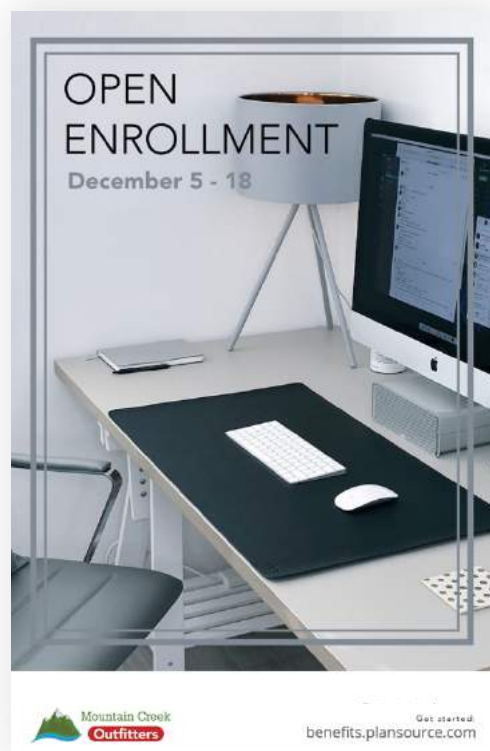
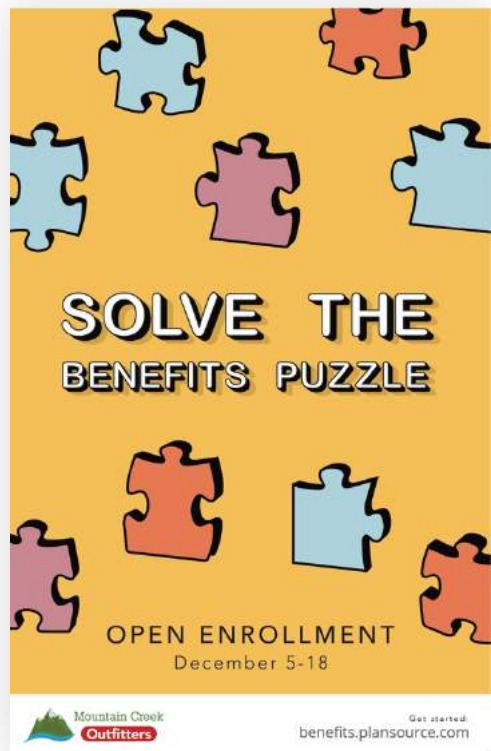
Get the resources at [plansource.com/oekit](https://plansource.com/oekit)

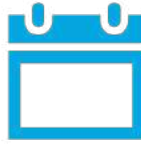
- Best practices
- Recommended timeline
- Customizable packages
- Design templates
- Video postcard
- Email and text messaging templates
- Educational videos
- In-system messaging



# OE Digital Communications Kit

*15 free design templates with new 2020 designs available now*





FREE WEBINAR

# Extraordinary Times, Extraordinary Measures: Virtual Open Enrollment Survival Tips

Thursday, August 27  
1pm ET/10am PT

# Release Communications

*Upcoming Promotions and Resources*



Release  
Webpage



General  
Preview



Release  
Notes



Updated  
PSU Courses

**8/26**

General Cosmos Release  
Preview Webinar

1-2 p.m. ET



# Q&A





PLANSOURCE<sup>®</sup>

*One Source. Many Benefits.*

Thank You for Joining Us!

*Elite Cosmos Release Preview*