PLANSOURCE®

One Source. Many Benefits.

Cosmos Release Preview

August 26, 2020

Today's Speakers

Darren Lucas
Product Manager

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Product Manager

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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

Cosmos Release Key Themes
Updates Center Around Customer Feedback & 5 Major Benefits

Streamlined Enrollment

More Self-Service

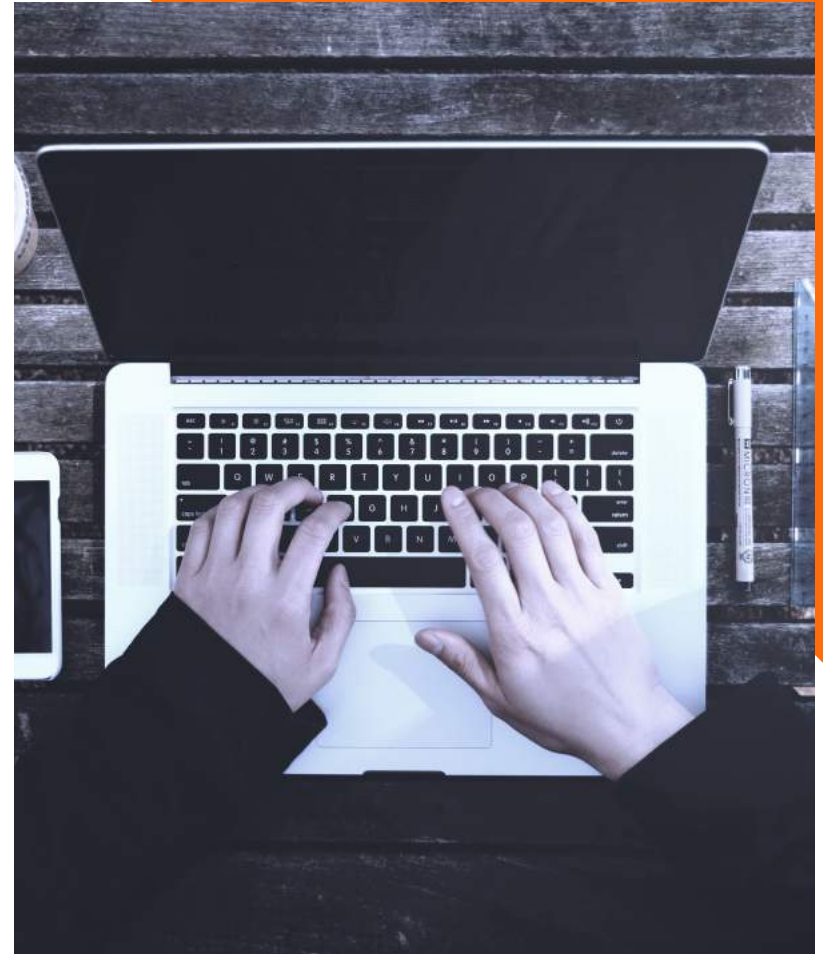Better HR Efficiency

Easier Configuration

Virtual OE Success

AGENDA

HR Experience

Employee Experience

PlanSource Boost

Marketing Updates

Wrap-Up & QA

HR Experience

Greater Configurability & Streamlined Page Designs Optimize HR Efficiency

HSA Contributions

HSA Employer Lump Sums
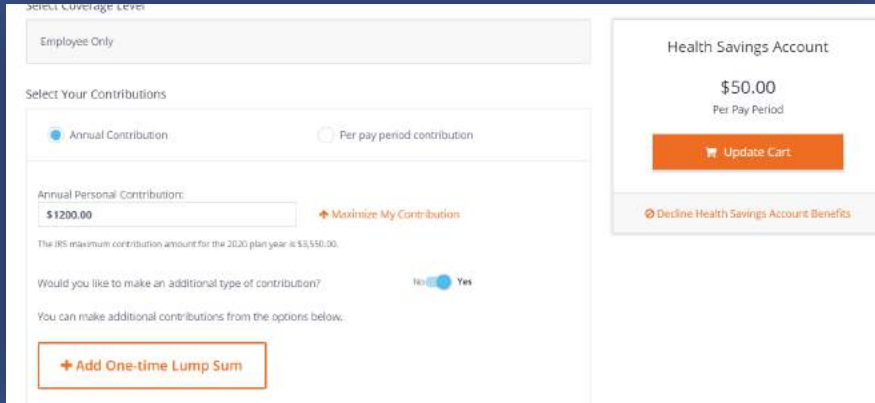*Manage Lump-Sum Contributions Directly through PlanSource*

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

Now available for early adopters

Data available through EDI files and Ultimate API

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

DEMO

HSA Contributions

Admin Experience Enhancements

More Efficient New-Hire Processing

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

New Employee Audit Page
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

Guided Renewal

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

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

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

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
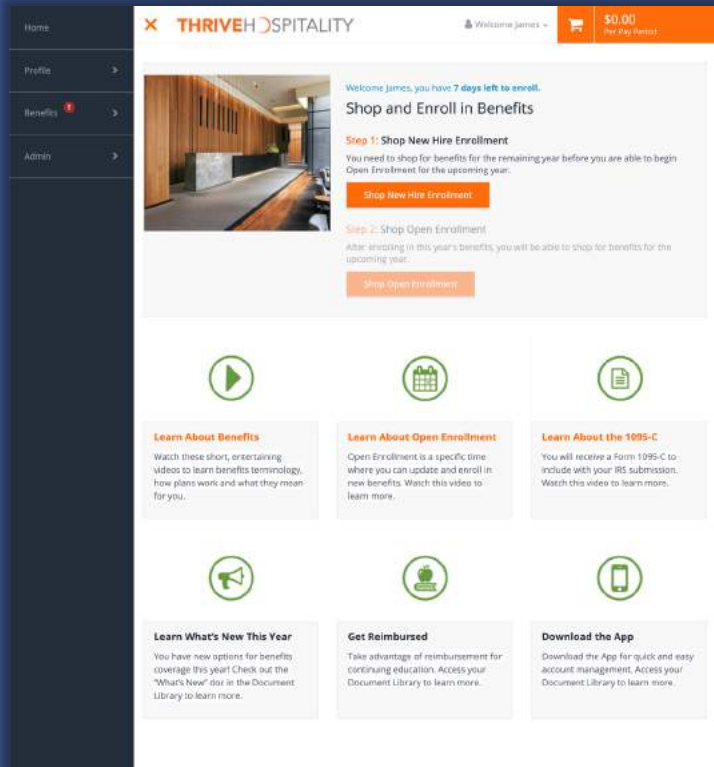
Improved Dual Enrollment

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

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

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

DEMO

Employee Experience

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

Guardian

Lincoln Financial Group

MetLife

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

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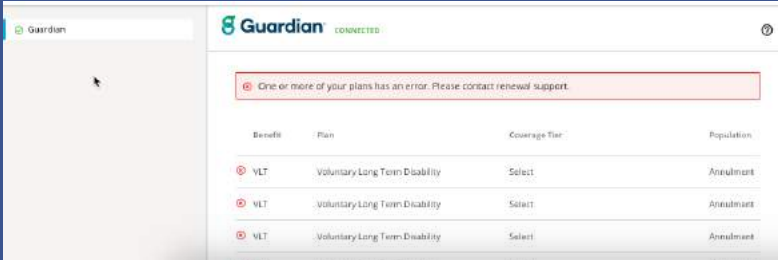
AFTER
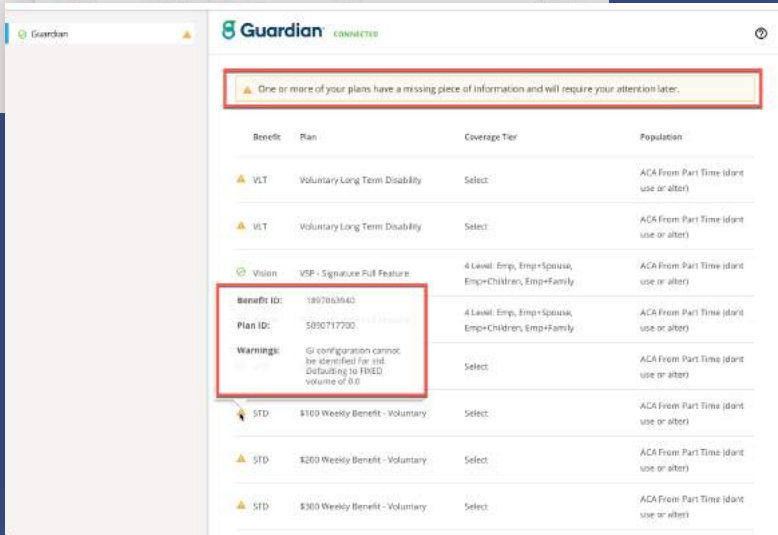
Real-Time Data Validation & Visibility

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

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

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Plan Configuration Enhancements & Enrollment API
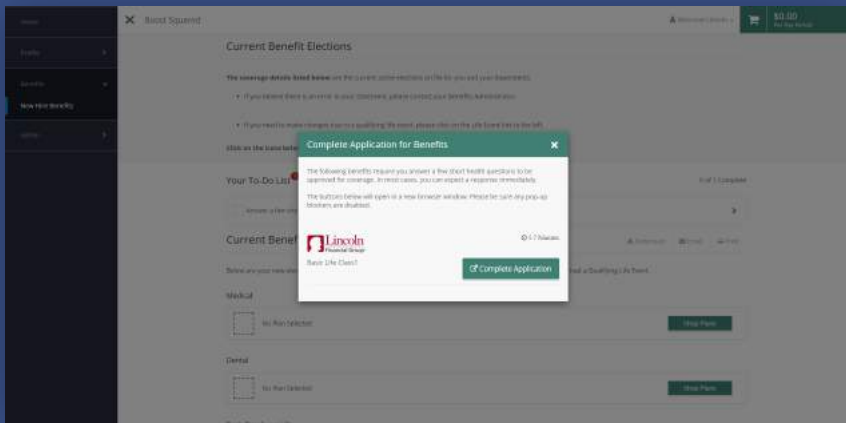
EOI Single Sign-On (SSO)
Now available for Lincoln Financial Group for groups with >1,000 lives

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

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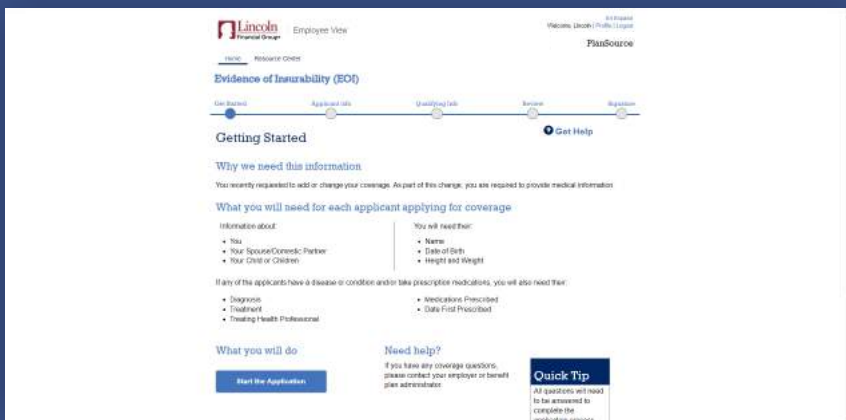# EOI Integrations Provide the Best Experience

	Integrated Shopping Experience	Automated Decision Notification
Cigna	Available Now	Available Now
Guardian	Available Now*	Available Now
THE HARTFORD	Available Now (Early Adopters)	Future Release
Lincoln Financial Group	Coming Sept 2020 (1,000+ Employees - Cosmos)	Future Release
MetLife	Available Now (100+ Employees – Cosmos)	Available Now (100+ Employees)
Prudential	Available Now	Available Now
unum	Available Now	Future Release
VOYA FINANCIAL	Available Now	Future Release

Some state limitations apply
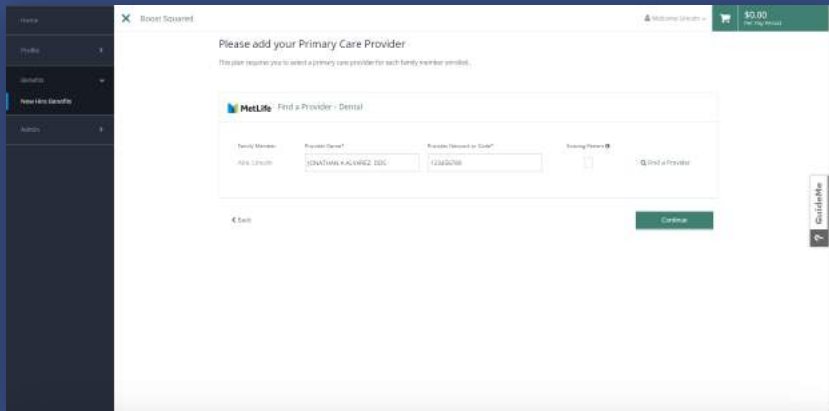
Instant Provider Search

New "Find a Provider" Directory Integration Added for MetLife

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

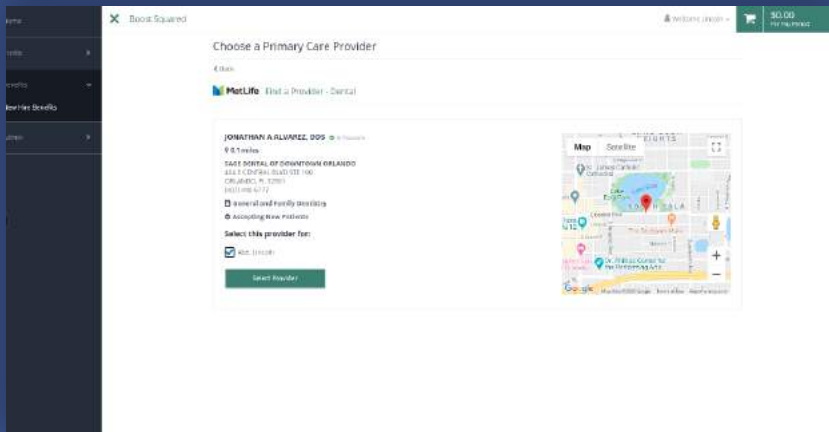Available for MetLife Dental PPO Plan

Also available for Guardian

Marketing Updates

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

Free OE Digital Communications Kit
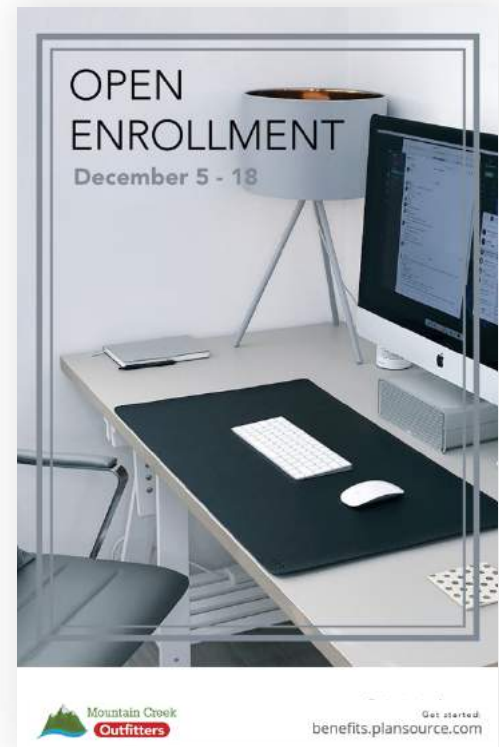
Get the Resources at plansource.com/oekit
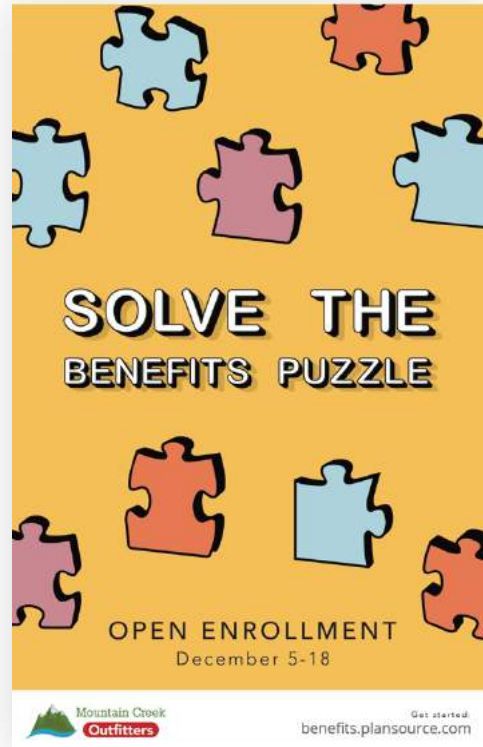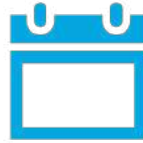
Best practices

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	Preview Webinar	Release Notes	Updated PSU Courses

bit.ly/cosmos-release

hr-experience.releasenotes.io/

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Thank You for Joining Us!

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