



PLANSOURCE[®]

One Source. Many Benefits.

Cosmos Release Preview

August 26, 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

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

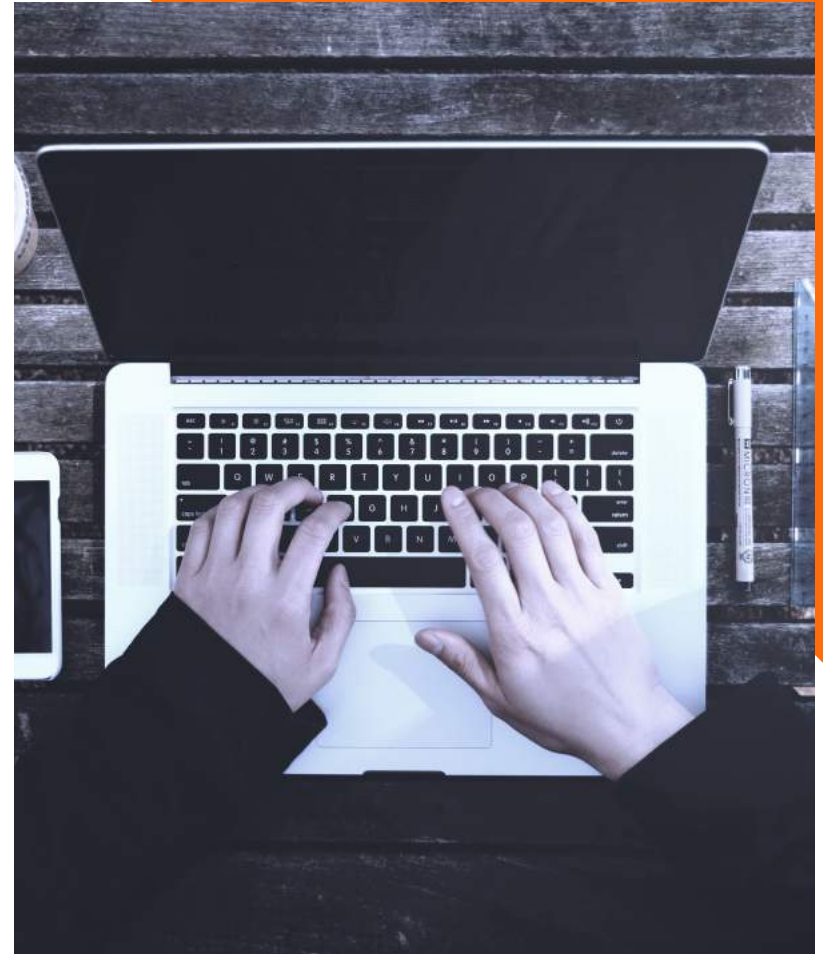
HR Experience

Employee Experience

PlanSource Boost

Marketing Updates

Wrap-Up & QA



HR Experience

*Greater Configurability & Streamlined Page
Designs Optimize HR Efficiency*

HSA Contributions

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

\$2,550.00
Annual Contribution

↑ **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
\$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*

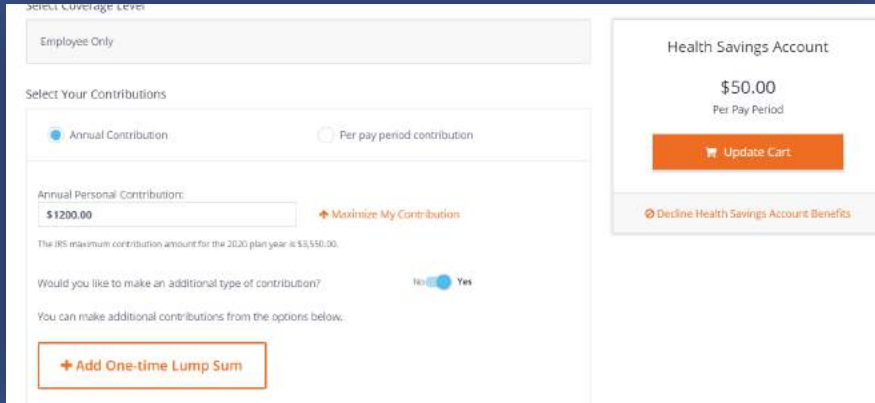
Contribute to employee HSA accounts – a popular incentive for HDHP participation

Now available for early adopters

Data available through EDI files and Ultimate API

HSA Employee Lump Sums

Allowing employees to utilize HSA funds earlier in the plan year



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

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

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DEMO

HSA Contributions

Admin Experience 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:

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

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

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

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	Payment Account 24 XXXX06244
Assigned Populations	
Allow Per Population Payment Accounts Off <input checked="" type="checkbox"/> On	
<input type="checkbox"/> Location 1 Population	Payment Account 24 XXXX06244
<input type="checkbox"/> Location 2 Population	Payment Account 15 XXXX9615

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*

THRIVE HOSPITALITY Welcome Ben \$0.00 Your Pay Period

Choose your Medical Insurance

The first step: **Choose your Medical Insurance.**
 Decide what's right for your lifestyle. Figuring out which plan is right for you and your family can be a little complicated—but don't worry, we're going to help you figure it out.
 Use our resources in the 'additional content' section to help choose the best plan for you, depending on what you think your medical needs will be for next year.
Research, learn and choose the best plan for your upcoming year.

Additional Content (3):

- [Watch: See your medical options](#)
- [Understanding Copays](#)
- [View your provider network](#)

[View Less](#)

[← To Benefits](#) [→ Add Family Member](#)

Family Covered

- Yourself
- Stacey Smith

Sort by: Recommendation

Select a Plan

Recommended Plan			Cigna			Cigna		
PPO Choice - \$2,500 Deductible			HDHP Preferred - \$2,500 Deductible			HDHP Value - \$3,500 Deductible		
\$67.15			\$57.23			\$46.15		
Per Pay Period			Per Pay Period			Per Pay Period		
Deductible...	Coinsuran...	Out-of-Po...	Deductible...	Coinsuran...	Out-of-Po...	Deductible...	Coinsuran...	Out-of-Po...
\$2,500/\$...	100%/0%	\$5,000/\$...	\$2,500 / ...	80% / 20%	None	\$3,500 / ...	80% / 20%	None
View Plan			View Plan			View Plan		
<input type="checkbox"/> Compare			<input type="checkbox"/> Compare			<input type="checkbox"/> Compare		

Streamlined Enrollment Workflow

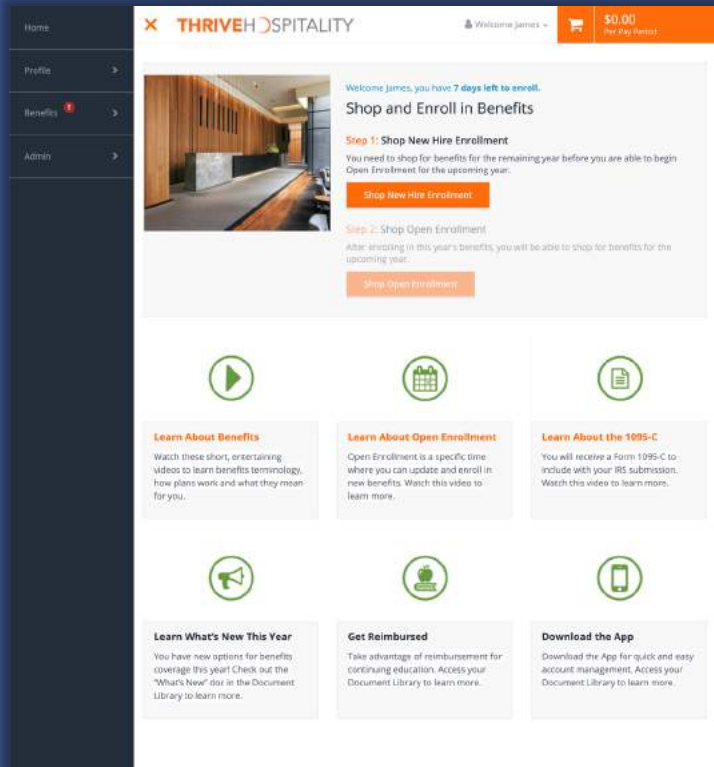
Focused Design to Limit Distractions & Improve Understanding

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 \$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](#)

Guardian
Voluntary Employee Life

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

[Update Cart](#)

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

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

The screenshot displays the Thrive Hospitality employee benefits portal. At the top, the logo 'THRIVE HOSPITALITY' is on the left, and a user greeting 'Welcome James' with a shopping cart icon and '\$77.53 Per Pay Period' is on the right. Below the header are three navigation cards: 'Watch: Why Life Insurance?', 'What's Evidence of Insurability?', and 'How to select a beneficiary'. A 'View Less' button is centered below these cards. The main content area is titled 'Life Insurance: Voluntary Employee Life'. A 'To Benefits' link is on the left. The central recommendation card features a blue lightbulb icon and text: 'We recommend enrolling in \$200,000.00 in coverage. Find out why.' with a 'Personalize' button. Below this is a 'Select Coverage Amount' section with a dropdown menu set to '\$100,000.00 (\$1.15)'. To the right is a card for 'THE HARTFORD Voluntary Employee Life' with a price of '\$1.15 Per Pay Period' and a 'Keep this Plan' button. At the bottom left, there is a 'Beneficiaries' section with an 'Edit Beneficiaries' link.

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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 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

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.

<input checked="" type="checkbox"/>	AD&D	AD&D	ALL ELIGIBLE NHE DIRECT...	ACA From Part Time (do not use or alter)
<input checked="" type="checkbox"/>	AD&D	AD&D	Multiple Classes	ACA From Part Time (do not use or alter)
<input checked="" type="checkbox"/>	AD&D	AD&D	ALL ELIGIBLE EMPLOYEES ...	ACA From Part Time (do not use or alter)

Apply Population to Selected:

APPLY

- All Active FT Employees
- All Active Employees
- All Employees
- All Active FT Employees
- All Employees

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

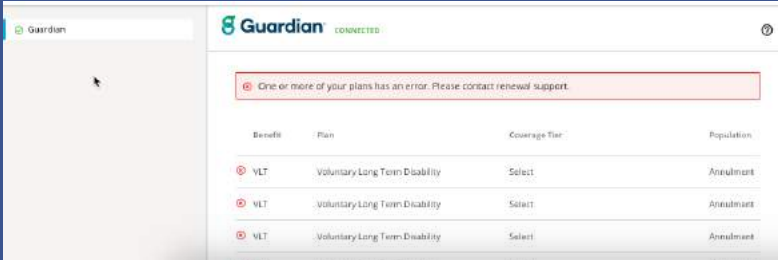
Exclude certain plans from import

Batch-edit plan populations

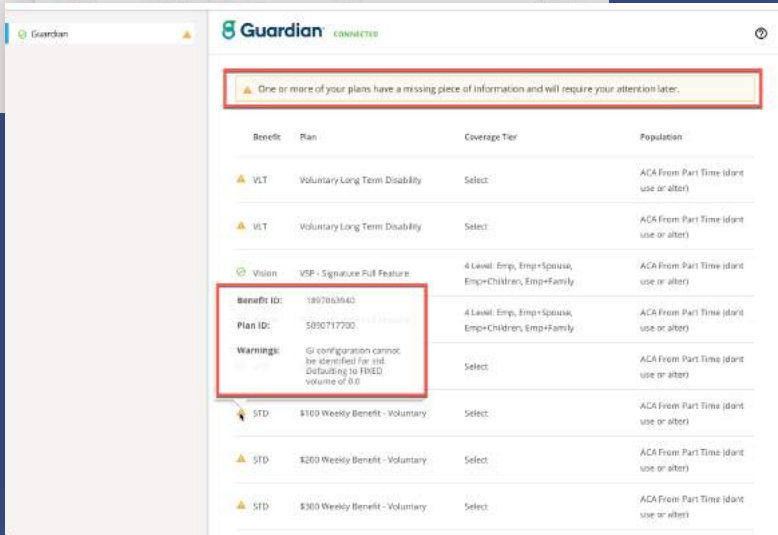
Restart Guardian integration process

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: Enter Employee Name

Employee Number: Enter Employee Number

Subscriber ID: Enter Subscriber ID

Transaction ID: Enter Transaction ID

From Date: mm/dd/yyyy

To Date: mm/dd/yyyy

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 13:47:13
<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 13:47:13

+ Employee

+ Dependents

+ Coverages

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

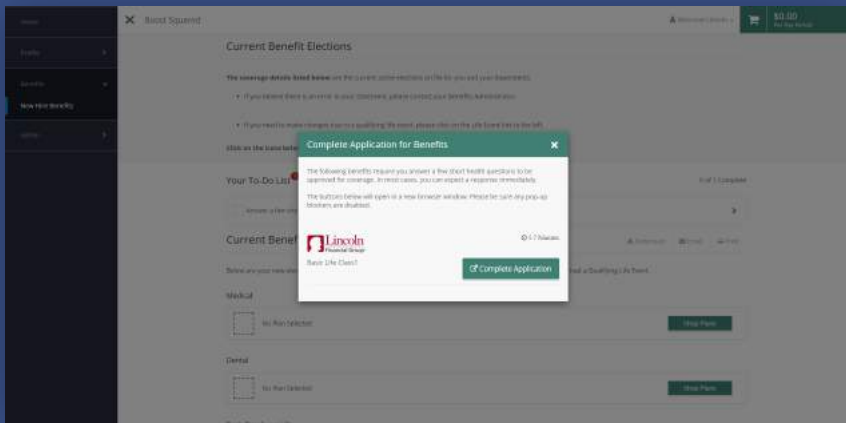
If an error occurs:

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

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Plan Configuration Enhancements &
Enrollment API



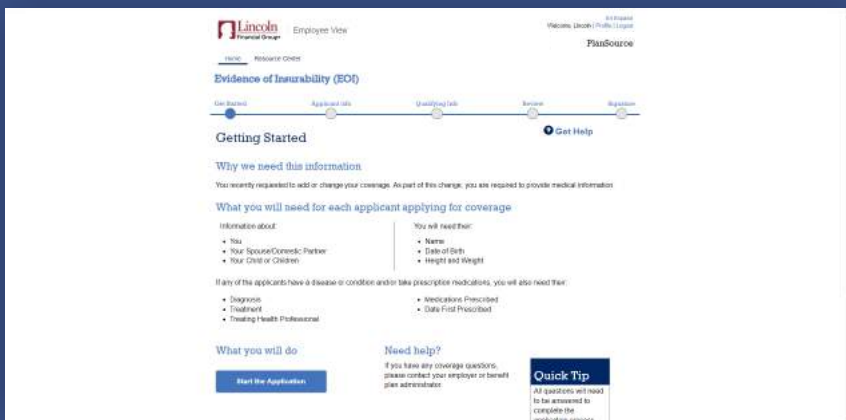
EOI Single Sign-On (SSO)

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









Eliminate extra steps and paperwork so employees can complete EOIs immediately

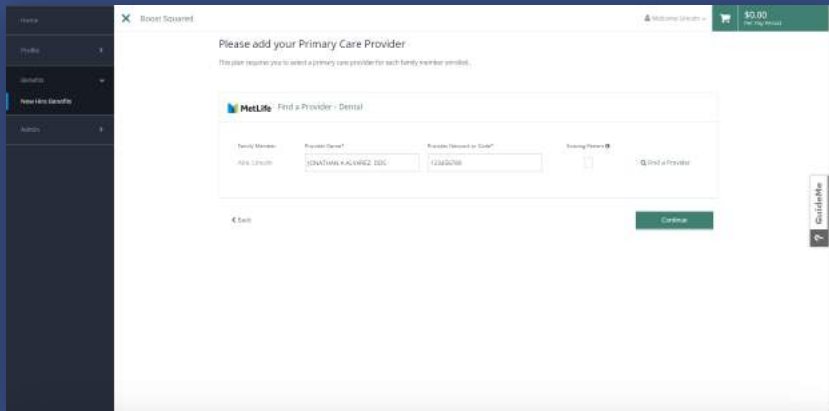
After enrolling, employees are taken directly to the Lincoln EOI form – no separate login needed

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



EOI Integrations Provide the Best Experience

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



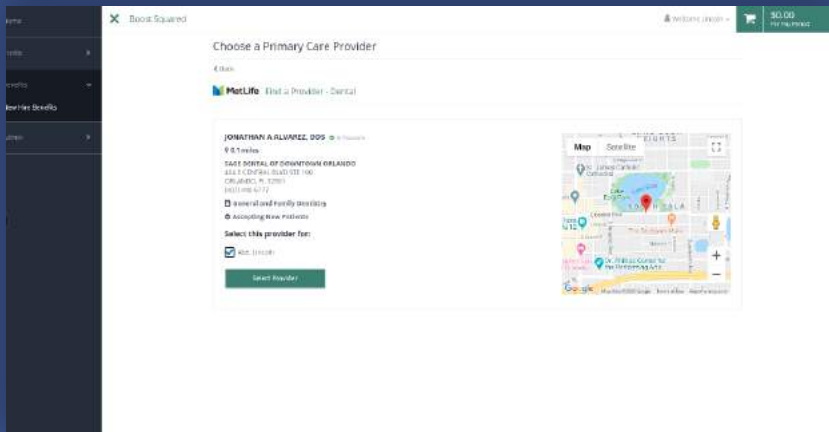
Instant Provider Search

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

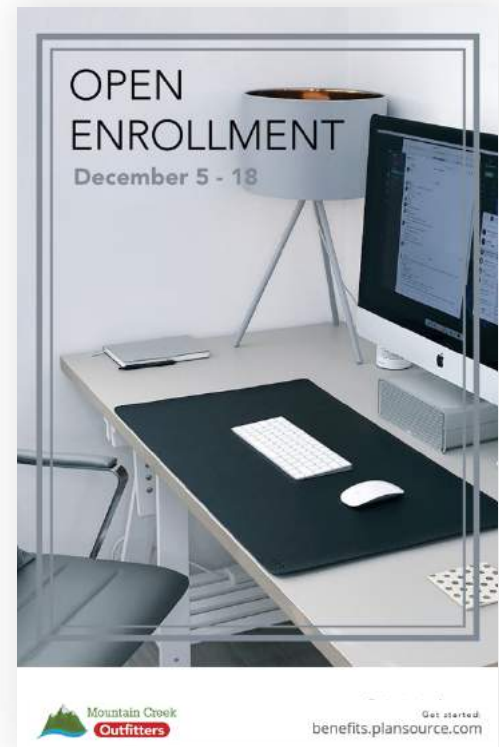
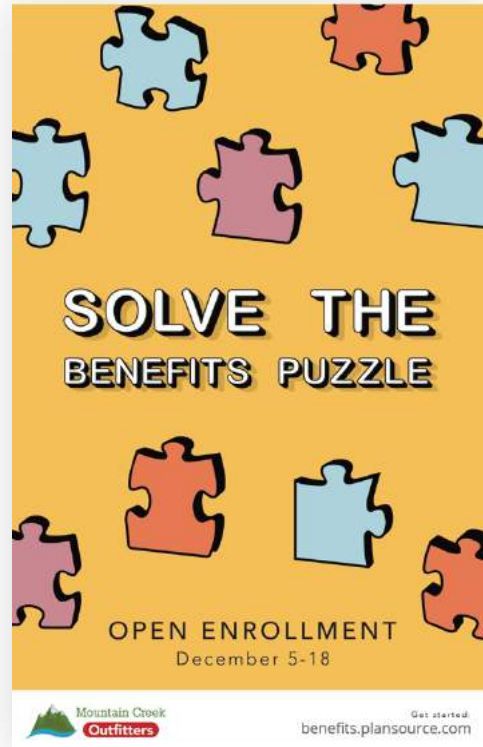
Get the Resources at plansource.com/oekit

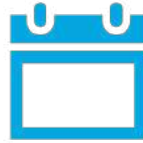
- Best practices
- Recommended timeline
- Customizable packages
- Design templates
- Video postcard
- Email and text messaging templates
- Educational videos
- In-system messaging



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

bit.ly/cosmos-release



Preview
Webinar



Release
Notes

hr-experience.releasenotes.io/



Updated
PSU Courses



PLANSOURCE[®]

One Source. Many Benefits.

Thank You for Joining Us!

Cosmos Release Preview