

# PREMIUM BENEFITS OUTSOURCING

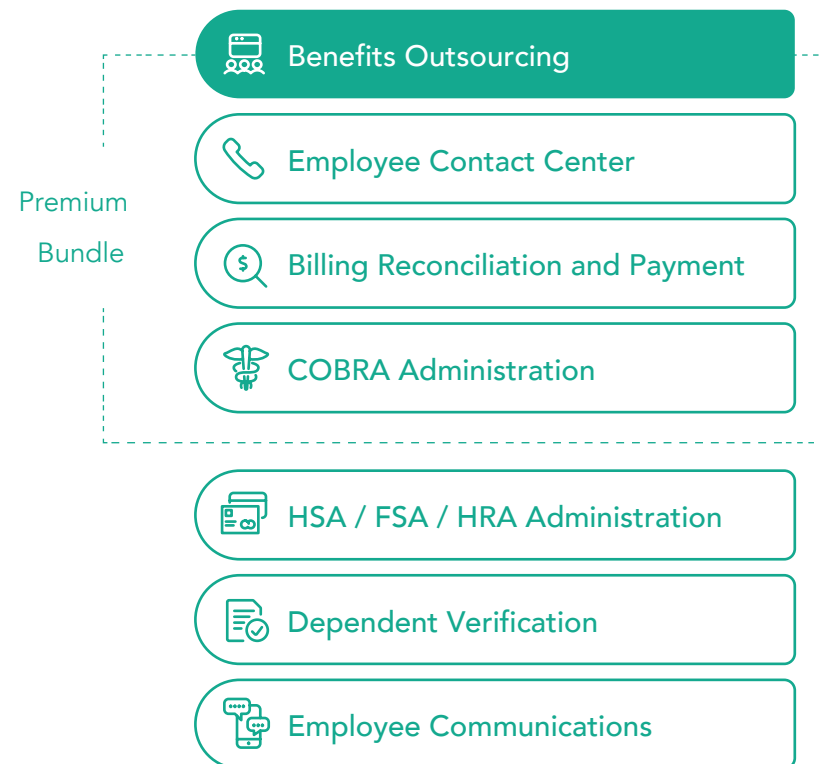
## Software + Services = A Better Benefits Experience

At PlanSource, we believe that the best way to build a better benefits experience is by combining best-in-class software with a range of high-touch benefit services. This simple equation provides brokers and employers with a complete solution that can help busy HR departments work more efficiently and focus on strategic initiatives rather than tedious tactics.

## Premium Benefits Outsourcing

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. Our benefits outsourcing service includes employee contact center, billing reconciliation and payment and COBRA administration. You can also add on a range of other services so that you can focus on more strategic items in your to-do list.

## PlanSource Benefits Services



## Why Benefits OutSourcing?

### Focus on Your Business

Trust the well-being of your employees to an established partner that is focused on managing employee benefits.

### Offer Great Service

Our benefits experts answer employee questions, provide phone-based enrollment and advocate for your employees throughout the year.

### Control Risk

Assist with complying with government regulations as well as your own internal policies and procedures.

# What Services are Included with Premium Benefits Outsourcing?



System 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

## Add-On Services

Communications  
and Fulfillment

Retiree  
Billing

Leave of  
Absence Billing

Dependent  
Verification

FSA/HSA/HRA  
Administration

QMCSO  
Processing

Examples of custom communication campaigns tailored for your workforce:

- Benefit Websites
- Text Messaging
- Communication Plans
- Benefit Guides (Print or Digital)
- Total Compensation Statements
- Traditional Printed Materials
- Custom Videos
- Personalized Postcards
- New Hire Packets

# PlanSource Premium Benefits Outsourcing Bundle

You make the decisions, and we manage the details



## DAILY SUPPORT

- System configuration and maintenance
- Urgent eligibility processing
- Contact center support for employees
- COBRA enrollment and administration



## WEEKLY PROCESSING

- New hire and life event processing
- Dependent document verification for life events
- Evidence of Insurability processing
- HR/Payroll import of demographic changes
- Payroll deductions export
- Enrollment transactions to insurance carriers
- Resolution of data exchange discrepancies



## MONTHLY BILLING

- List-bill discrepancy identification and reconciliation
- Self-bill creation
- Consolidated billing and financial reporting
- Premium billing payment simplification
- COBRA premium remittance to client
- COBRA auditing



## QUARTERLY AUDITS

- Medical, Dental, & Vision carrier audits
- Payroll audit discrepancy reporting
- Business reviews with your HR leaders



## ANNUAL PROJECTS

- System setup and configuration changes
- Post-OE data exchange and audit with carriers
- Post-OE payroll audit