PLANSOURCE

Halo Partner Preview Webinar

MAY 20, 2021

WILL WE HAVE ACCESS TO TODAY'S PRESENTATION?

Yes!

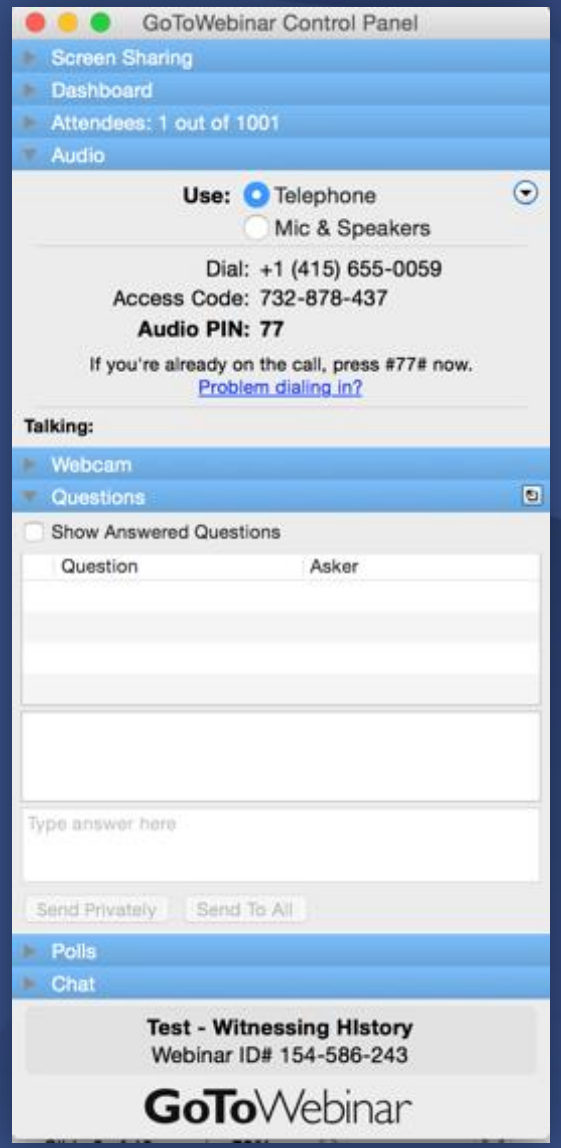
We will email you a link to the on-demand recording following today's webinar.

HOW TO ASK A QUESTION

Type your question into the “Questions” panel

QUESTIONS

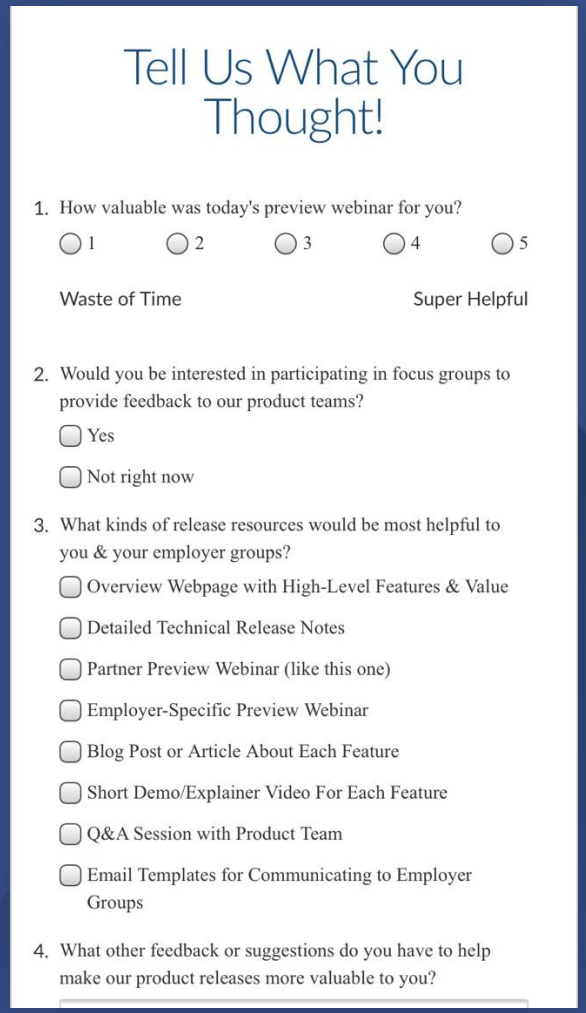
We will answer these during the live Q&A at the end.



Tell us what you thought!

SURVEY

After today's webinar ends, you'll be prompted to complete a short survey. We'd love your candid feedback on how we can make our releases more valuable for you and your teams.



Tell Us What You Thought!

1. How valuable was today's preview webinar for you?

○ 1 ○ 2 ○ 3 ○ 4 ○ 5

Waste of Time — Super Helpful

2. Would you be interested in participating in focus groups to provide feedback to our product teams?

☐ Yes

☐ Not right now

3. What kinds of release resources would be most helpful to you & your employer groups?

☐ Overview Webpage with High-Level Features & Value

☐ Detailed Technical Release Notes

☐ Partner Preview Webinar (like this one)

☐ Employer-Specific Preview Webinar

☐ Blog Post or Article About Each Feature

☐ Short Demo/Explainer Video For Each Feature

☐ Q&A Session with Product Team

☐ Email Templates for Communicating to Employer Groups

4. What other feedback or suggestions do you have to help make our product releases more valuable to you?

PLANSOURCE

HALO PREVIEW RELEASE WEBINAR | MAY 13, 2021

Darren Lucas
Senior Product Manager

Ryan Jepson
Senior Product Manager

Bryce Deneen
Dir. of Product Management

Cat Miller
Senior Director of Marketing

AGENDA

DependentIQ

Guided Renewal and Launch

New Login Experience

PlanSource Boost

UKG HCM Enhancements

PlanSource Ideas Portal

Marketing Updates

HALO RELEASE THEMES

Reduce Costs with AI

HR Efficiency

PlanSource Boost

HCM Enhancements

QUARTERLY RELEASES

Continuous Investment and Innovation

UPCOMING RELEASE

Halo
June 10, 2021

Titan
September 9, 2021

Zenith
December 9, 2021

Major releases four times per year with a published release schedule. Learn more at plansource.com/releases.

Transparent release communications, including a web page, training videos, in-system and e-mail notifications

DependentIQ

Reduce Costs with AI

DEPENDENTIQ ADD-ON MODULE

Instantly verify dependents with AI-powered eligibility verification in PlanSource

MINIMIZE COSTS & RISK

Our system will instantly and preemptively verify dependents at the time of enrollment, eliminating the burden of post-enrollment audits, lowering costs and improving compliance.

SMART AI/ML AUTOMATION

Powered by AI and ML technology, DependentIQ recognizes required documents and instantly detects and validates key data elements to enable real-time verification at enrollment.

REAL-TIME RULE ENFORCEMENT

If ineligible dependents are never allowed to enroll in the first place, they don't have to be removed later, saving time and eliminating the need to have uncomfortable conversations with employees.

A BETTER WAY TO VERIFY DEPENDENTS

AI/ML technology provides an opportunity to streamline an inefficient and costly process

EXISTING SOLUTIONS

1. Configure and set up document request rules manually
2. Employees submit documents
3. HR manually looks up employee profile and cross-checks with document
4. HR approves or denies document

DEPENDENTIQ

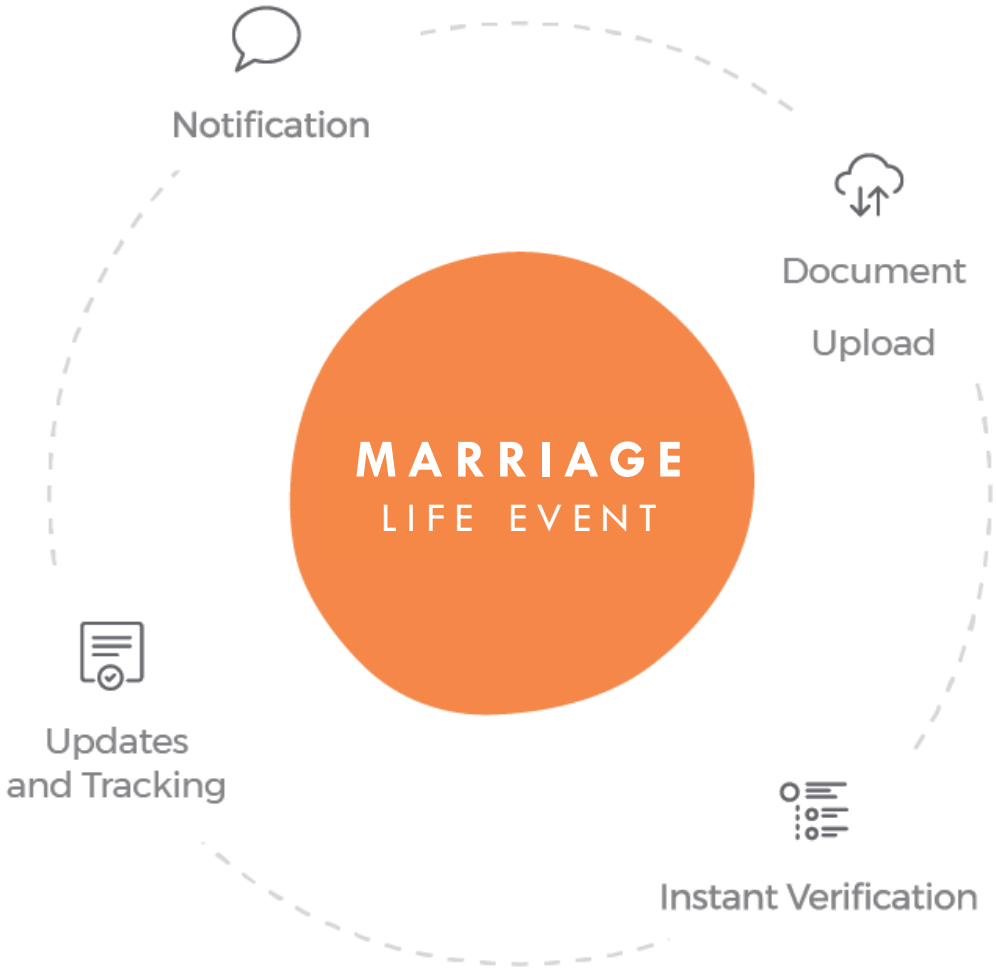
1. Auto-configured document request rules
2. Employees submit documents
3. Image recognition and auto-detection eliminates 85%+ of manual document review for supported documents
4. Optimized workflow queue allows easy and quick task management

DependentIQ Example

How DependentIQ works for a marriage life event

#1 NOTIFICATION

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



#2 DOCUMENT UPLOAD

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

#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.

#3 AUTO-VERIFICATION

Our powerful DependentIQ AI/ML technology automatically scans the document and instantly approves the document, which verifies the dependent.

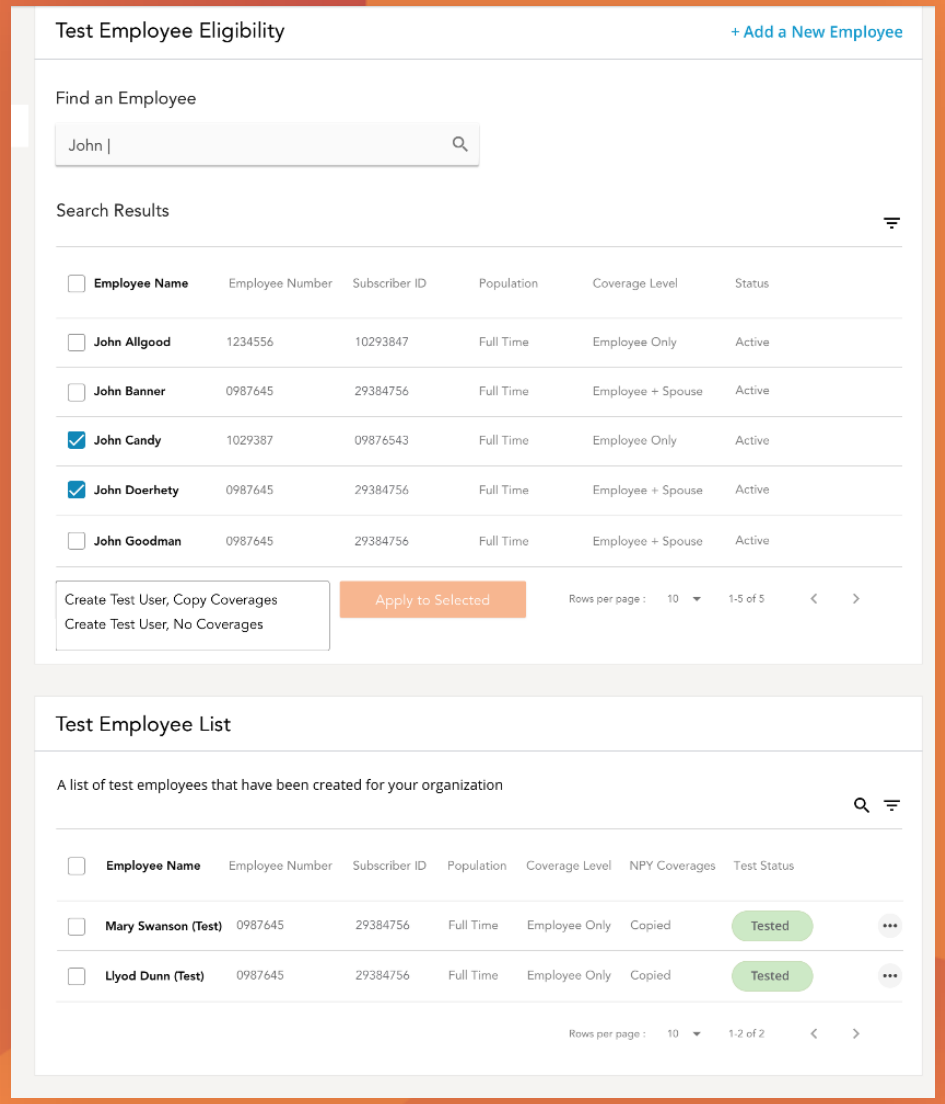
Demo

Now accepting Early Adopters

Implementations to begin on July 1st

Guided Launch & Renewal

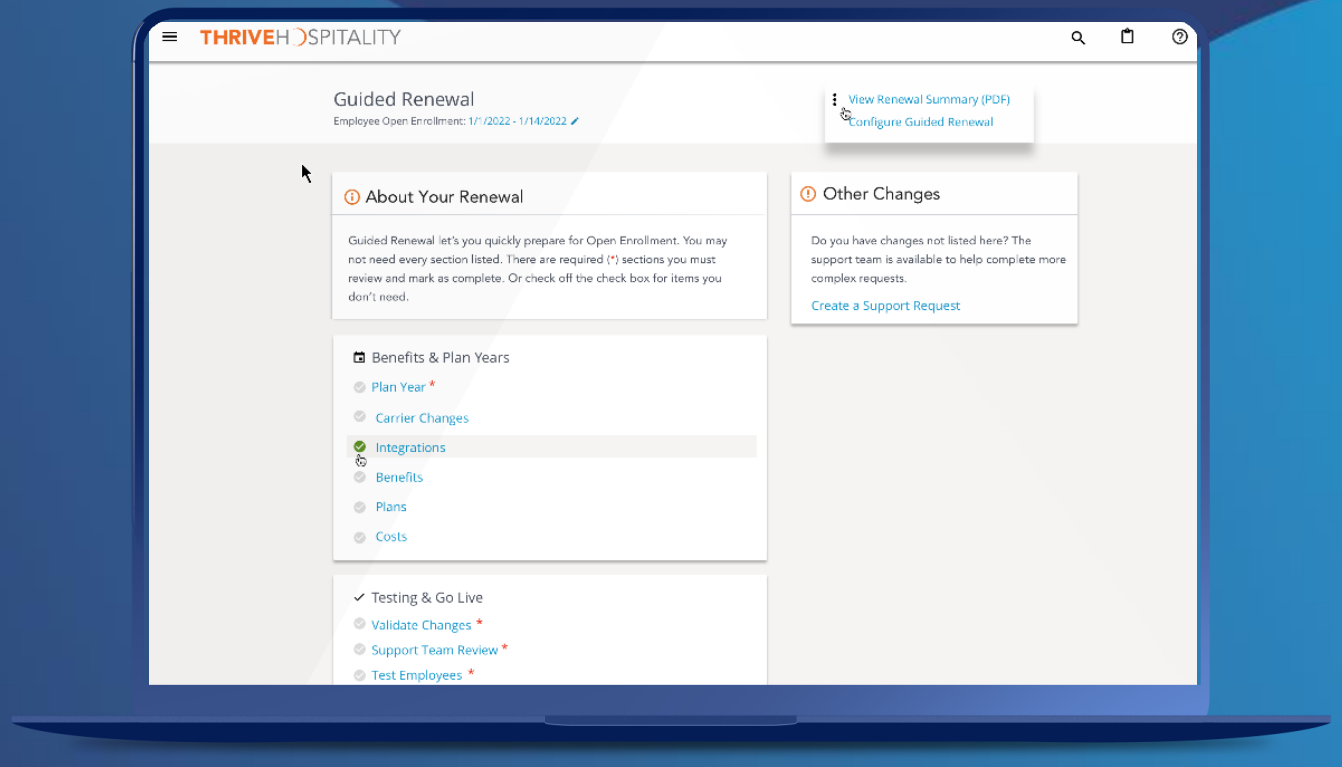
HR Efficiency



Q2 – Halo

GUIDED TESTING

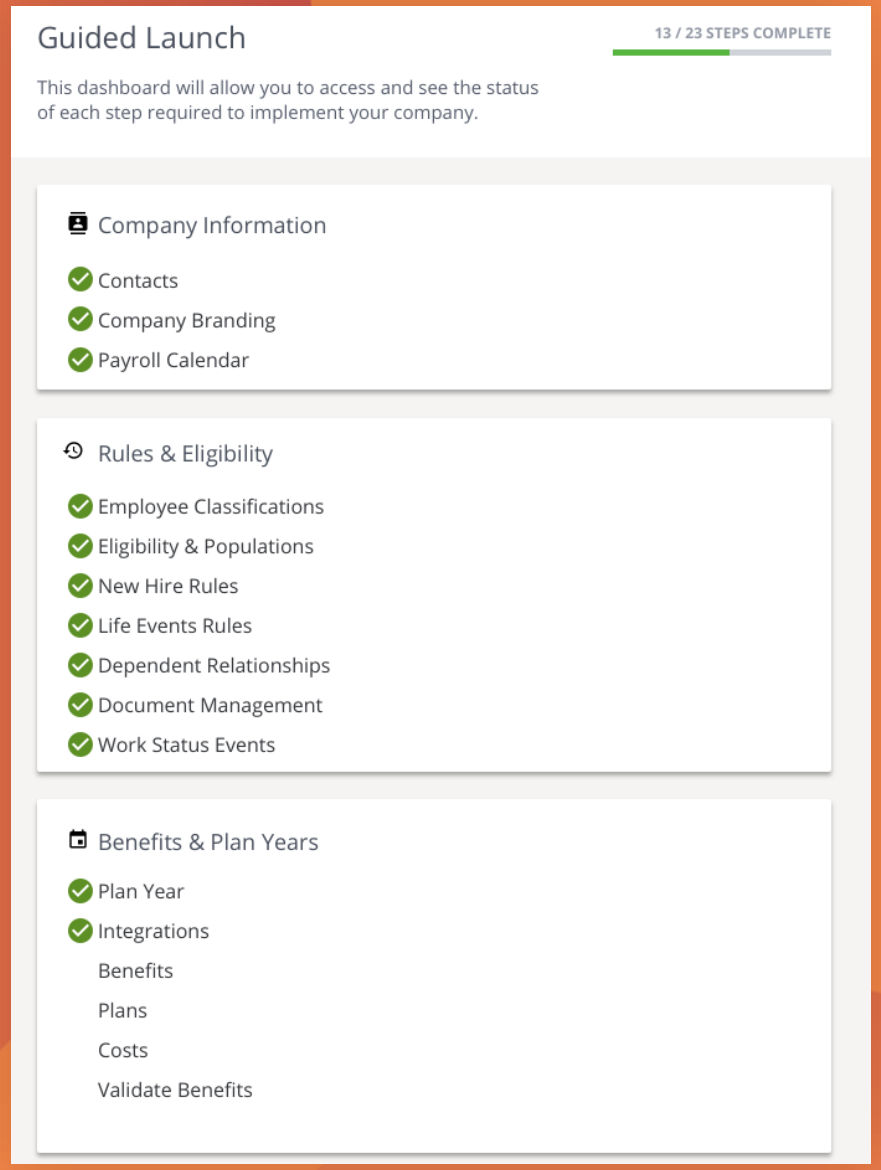
- A large portion of renewal hours are spent on testing
- Allows users to create new test employees, copy coverages, and test employees directly
- Allows users to mark off employees as tested
- Designed to be a one-stop testing solution



Q2 – Halo

GUIDED RENEWAL DASHBOARD

- Removes the What's Changing Survey to reduce friction and number of restarts
- Aligns with Guided Launch dashboard for a cohesive experience
- Boosts scalability for future additions
- Removes certain logic so HR leaders can test at any point in the renewal process rather than only at the end



Q2 – Halo

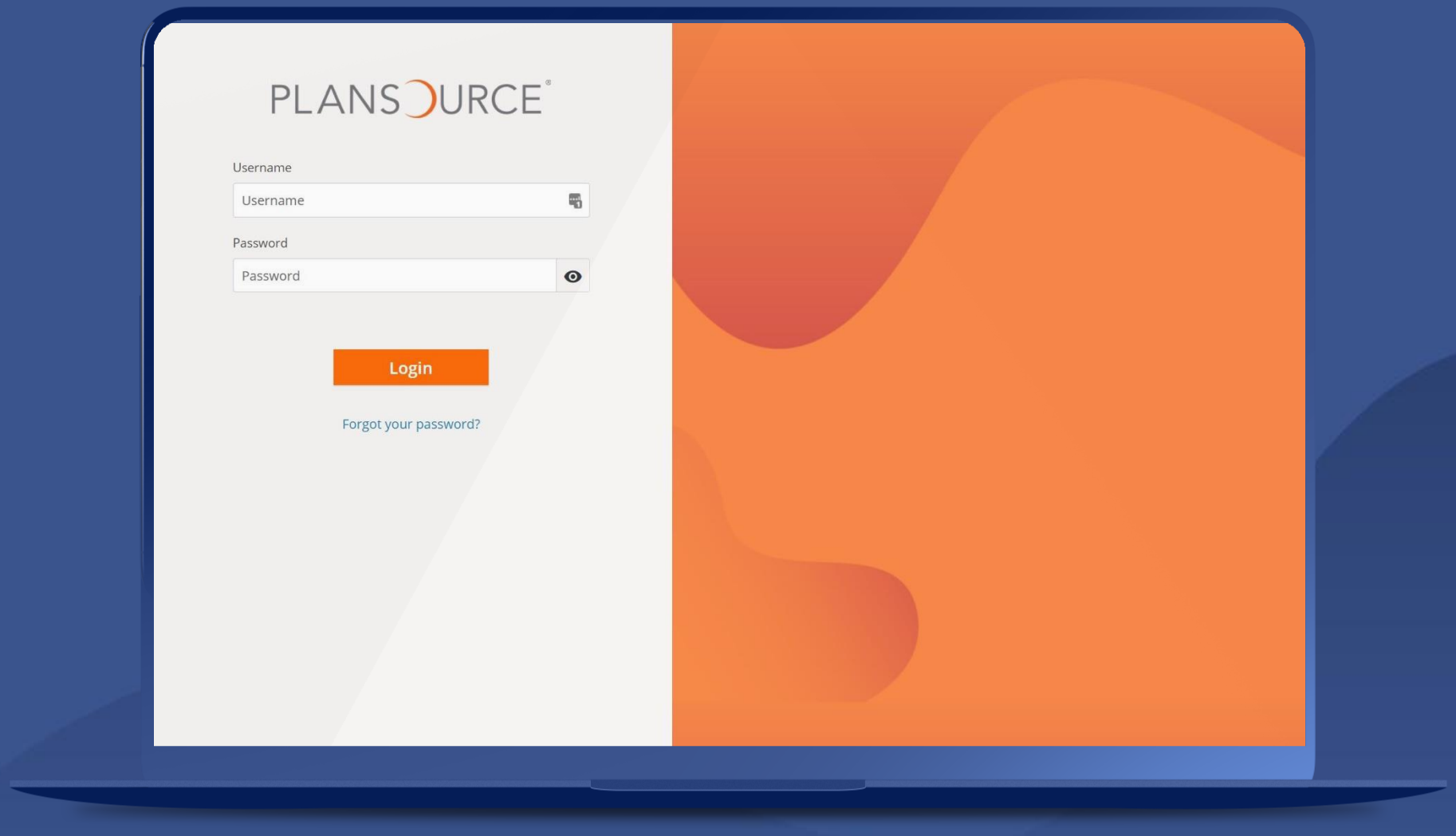
GUIDED LAUNCH DASHBOARD

- Rebrands Enhanced Implementation to Guided Launch
- Brings all elements of the implementation wizard into a cohesive, unified visual framework – productizing Guided Launch
- Brings additional elements of Guided Renewal into Guided Launch, such as testing

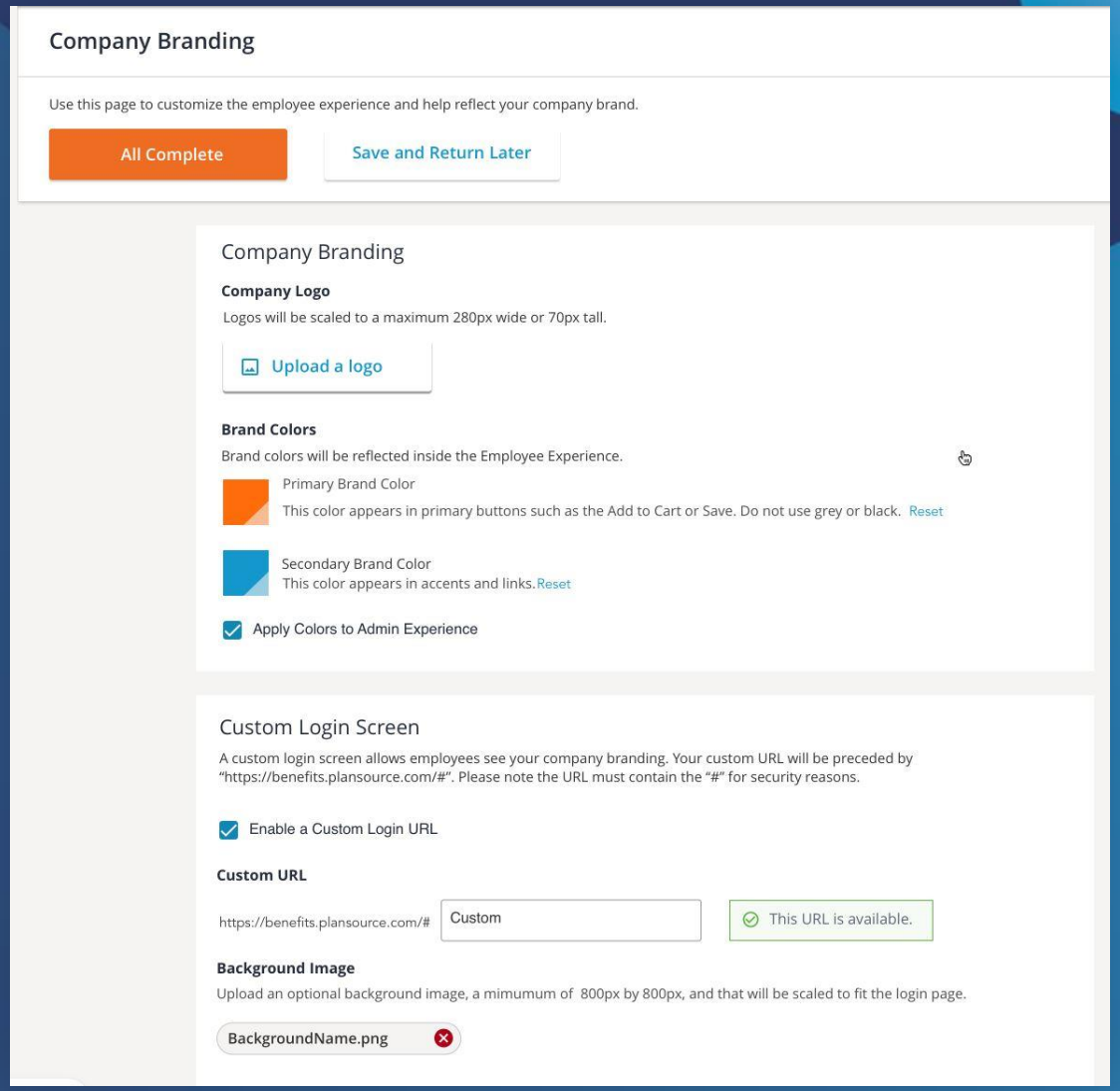
New Login Experience

Modern interface, clean design & custom branding

REDESIGNED LOGIN PAGE



Clean & modern interface | Secure and mobile-responsive, applies to all pages within login experience

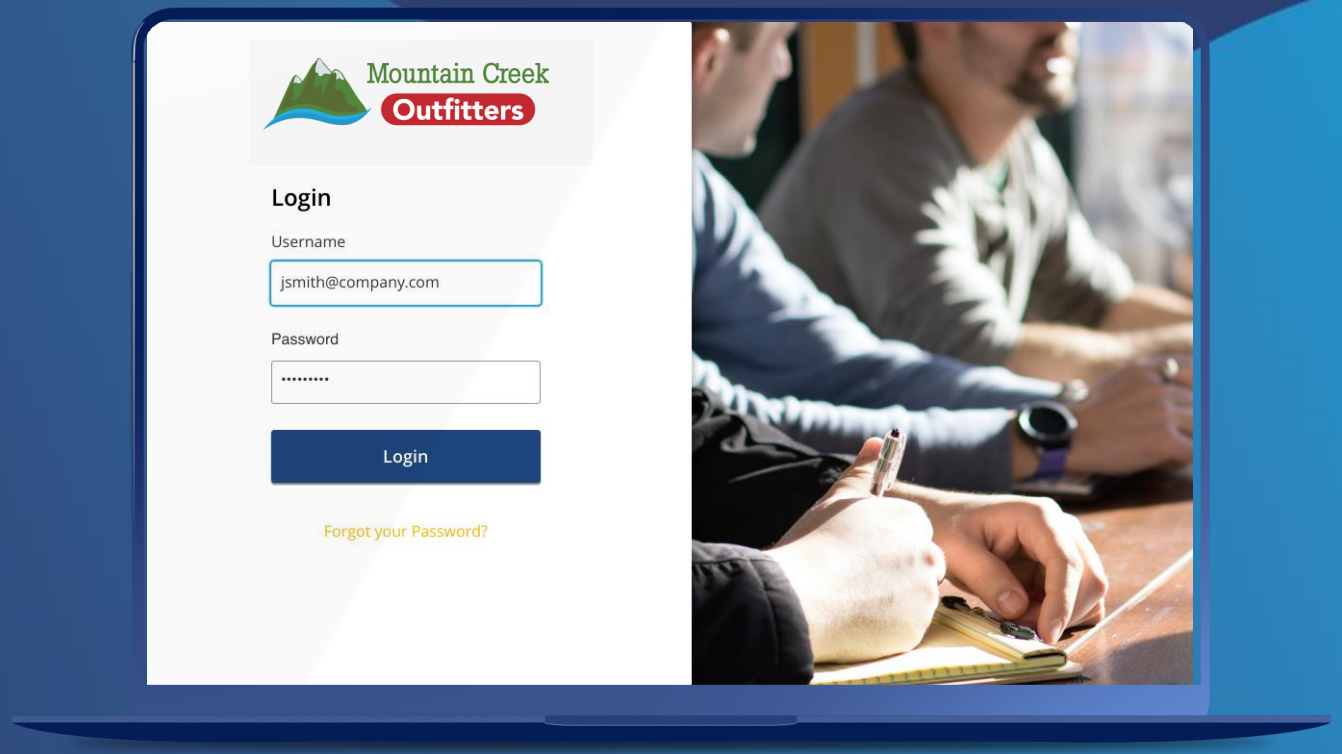


Company Branding Self-Service

Available in Guided Renewal, Guided Launch and on the HR admin dashboard mid-year

Allows HR leaders to upload their own logo and brand colors, ability to update at renewal if branding changes

If using custom logins, employer can choose custom URL and background image



Custom Login Pages

CHOOSE A CUSTOM URL:
benefits.plansource.com/?yourcompany

- Apply enrollment branding colors to your custom login page
- Show your logo
- Apply a custom background image

Our Early Adopter program for this feature is currently full, but stay tuned for updates on general availability this September!

Demo

Discontinuing Support of IE11

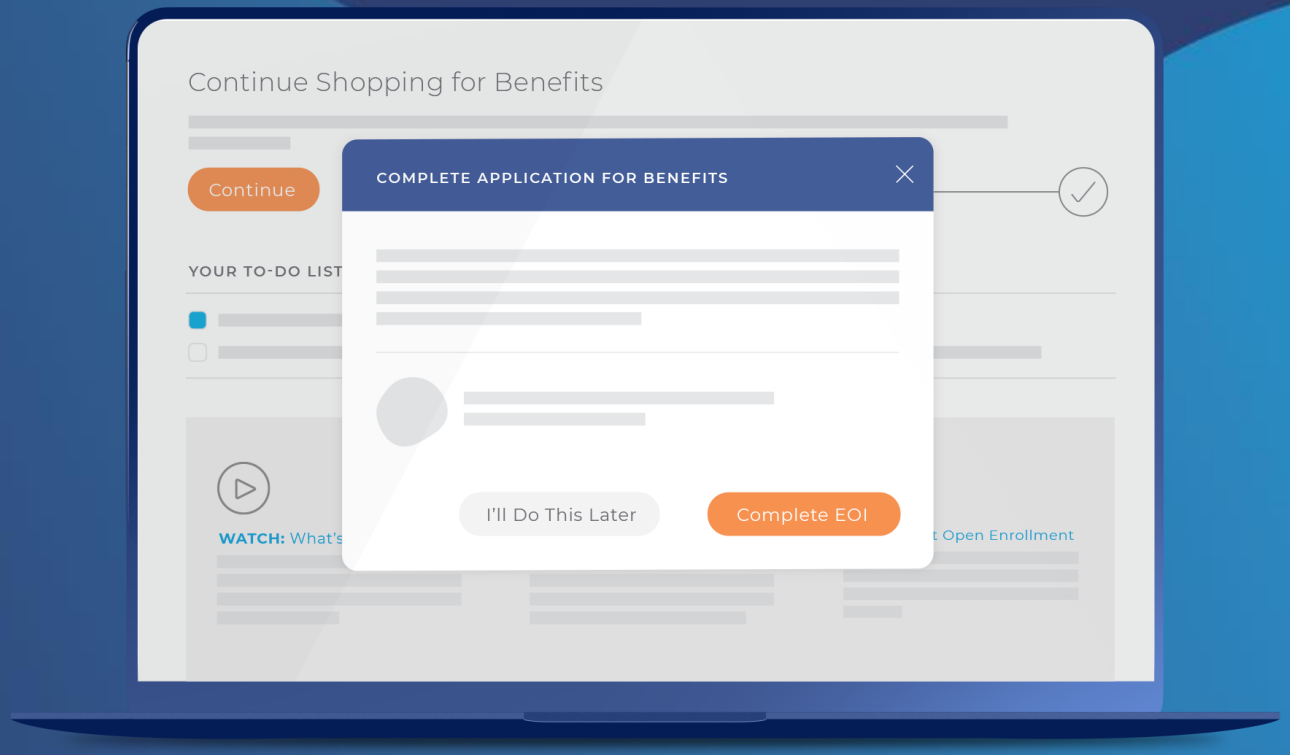
PlanSource will discontinue support of Internet Explorer 11

Users may still use IE11 but we will not support any bugs that exist, and new features will not be compatible with IE11

IE11 will be discontinued completely in the future

PlanSource Boost

Seamless Employee Experience



Sun Life EOI Integration

Evidence of Insurability Single Sign On allows employees to easily fill out EOI forms within the benefits shopping experience

Decision Notification reduces admin workload in approvals and provides status update to employee and HR team automatically

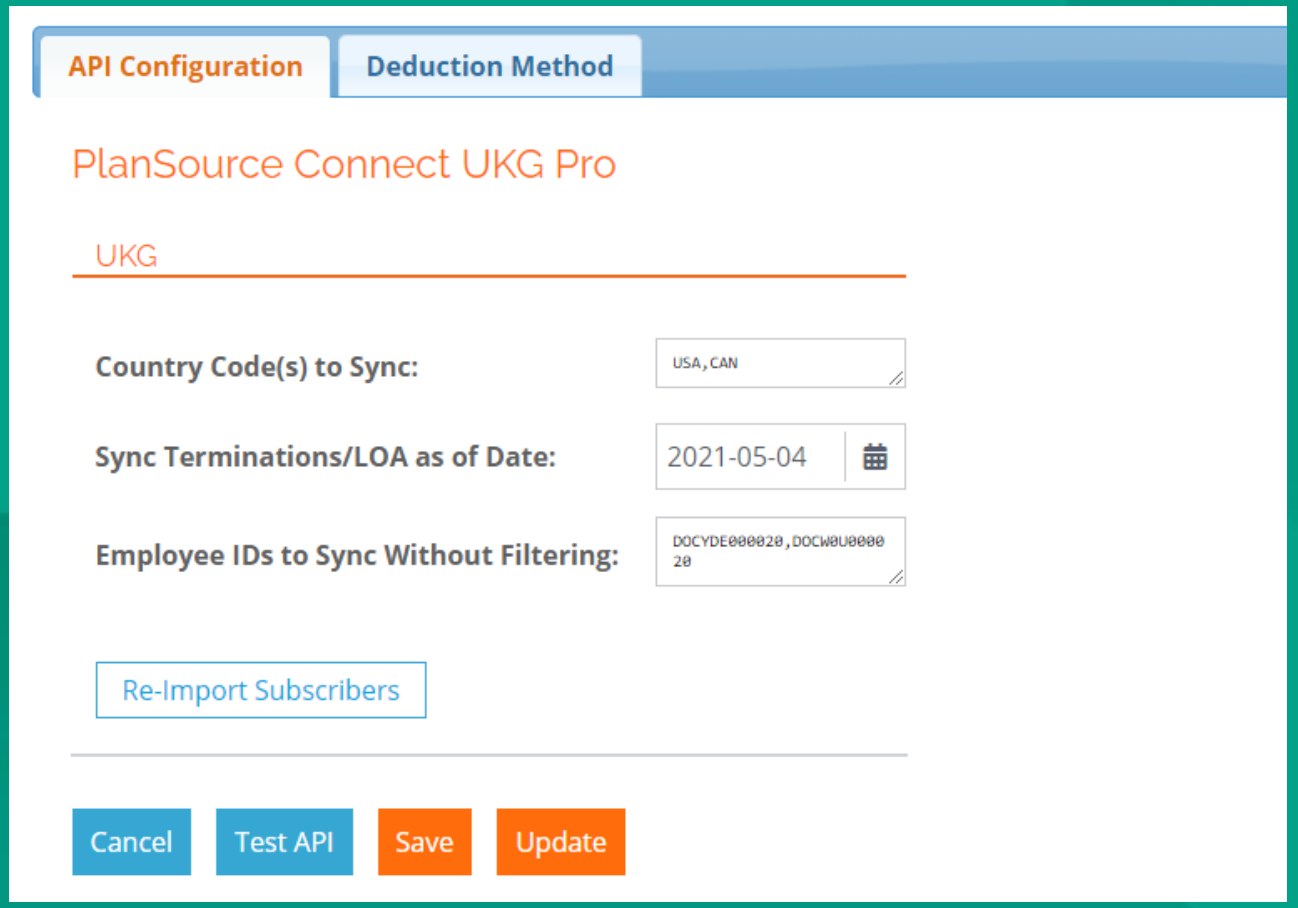
Available to early adopters in June!

Current EOI Integrations Available Today

	PHASE 1 Integrated Shopping Experience	PHASE 2 Automated Decision Notification
Aflac	Available for Early Adopters	Future Release
Cigna	Available Now	Available Now
Guardian	Available Now*	Available Now
The Hartford	Available Now (EARLY ADOPTERS)	Future Release
Lincoln	Available for Early Adopters (1,000+ EMPLOYEES)	Future Release
MetLife	Available Now	Available Now
Prudential	Available Now	Available Now
Sun Life	Coming in June Release	Coming in June Release
Unum	Available Now	Future Release
Voya	Available Now	Future Release

UKG Integration Updates

HCM Enhancements



UKG Pro — Sync What Matters

- Simpler GDPR compliance
- Reduced noise in the system
- Flexible configuration
    - Termination Date
    - Country Code
    - Overridable by Employee
- We need your feedback -> Do you need this feature for other HCM Providers?

OTHER UKG PRO ENHANCEMENTS

HSA EMPLOYER LUMP SUM CONTRIBUTION

PlanSource can now sync HSA Employer lump sum contributions from the benefits administration platform to UKG Pro

PAYROLL RECORD PARTIAL BATCHING

Employers will see all valid payroll records in UKG right away instead of having to fix issues. This will keep systems in sync and allow for greater flexibility when fixing errors

SUPPORT FOR NEW UKG PRO EVENTS

As UKG continues to add new events to their platform, PlanSource will continue to subscribe to them. These events ensure the platforms remain in sync in real time (ex: SSO Key Updated)

We Want To Hear From You!

The PlanSource Ideas Portal

THE IDEA PORTAL

We want your feedback!

SUBMIT IDEAS & ENHANCEMENTS

VOTE ON THE IMPORTANT ONES

INTERACT WITH THE PRODUCT TEAM

IMPACT THE PRODUCT ROADMAP & VISION

Demo

Marketing Updates

RELEASE COMMUNICATIONS: EXTERNAL

External Promotions and Resources

RELEASE WEBPAGE

plansource.com/release

PREVIEW WEBINAR

Customer Webinar:
May 27 @ 2pm ET

HALO RELEASE GO-LIVE

June 10

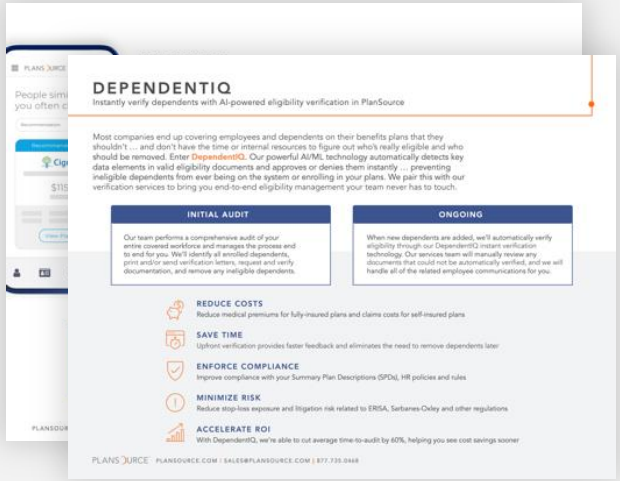
RELEASE NOTES

UPDATED PSU COURSES

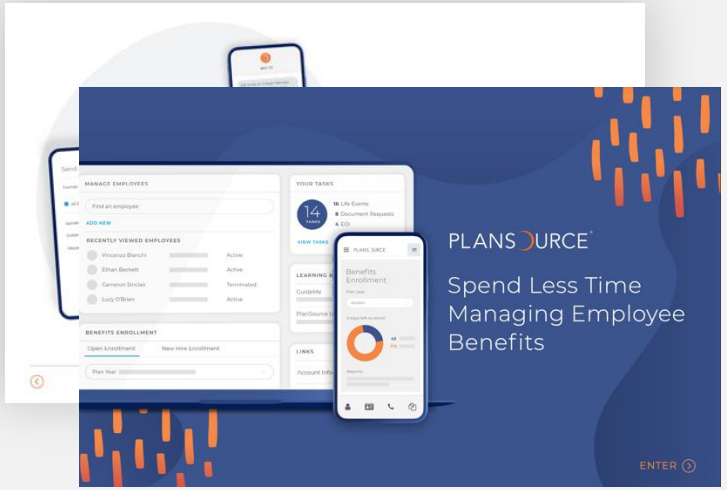
COMING SOON
Posted to Halo Webpage
releases.plansource.com

New Website and Demo Videos Launched

PlanSource digital marketing resources



plansource.com/collateral
plansource.com/decisioniq
plansource.com/dependentiq
– NEW –



plansource.com/portfolio
– NEW –

boost.plansource.com

OTHER RESOURCES

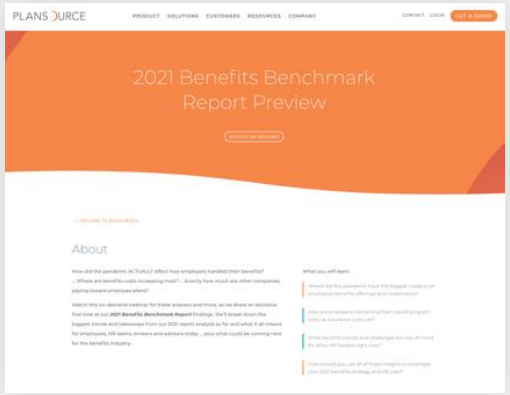
New RFP Template: plansource.com/rfptemplate
New Demo Video Library: plansource.com/demovideos
Educational Videos: plansource.com/videolibrary

New Resources

PlanSource digital marketing resources

2021 ANNUAL BENEFITS BENCHMARK

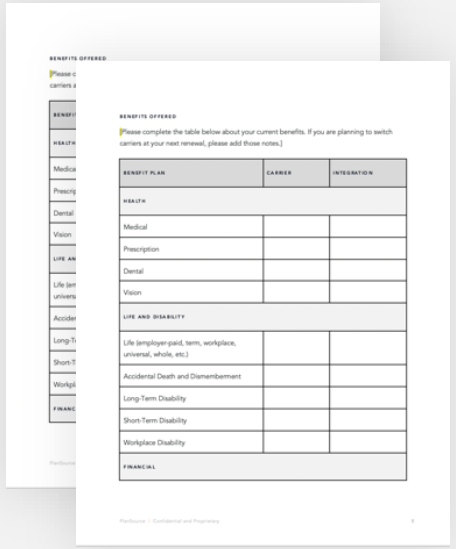
Report and webinar now available



plansource.com/benchmark
plansource.com/webinars
– NEW –

BENEFITS TECHNOLOGY RFP TEMPLATE

Comprehensive guide to vendor selection



plansource.com/rfp
– NEW –

UPCOMING WEBINAR

BENEFITS OF AUTOMATED DEPENDENT VERIFICATION

Wed. June 3 | 1 pm ET

plansource.com/webinars

Ask your questions now.

Thanks for attending!