

DEPENDENTIQ

Instantly verify dependents with AI-powered eligibility verification in PlanSource

**FREE 90-DAY
TRIAL OFFER**
for HUB customers
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Most companies end up covering employees and dependents on their benefits plans that they shouldn't ... and don't have the time or internal resources to figure out who's really eligible and who should be removed. Enter **DependentIQ**. Our powerful AI/ML technology automatically detects key data elements in valid eligibility documents and approves or denies them instantly ... preventing ineligible dependents from ever being on the system or enrolling in your plans. We pair this with our verification services to bring you end-to-end eligibility management your team never has to touch.

INITIAL AUDIT

Our team performs a comprehensive audit of your entire covered workforce and manages the process end to end for you. We'll identify all enrolled dependents, print and/or send verification letters, request and verify documentation, and remove any ineligible dependents.

ONGOING

When new dependents are added, we'll automatically verify eligibility through our DependentIQ instant verification technology. Our services team will manually review any documents that could not be automatically verified, and we will handle all of the related employee communications for you.



REDUCE COSTS

Reduce medical premiums for fully-insured plans and claims costs for self-insured plans



SAVE TIME

Upfront verification provides faster feedback and eliminates the need to remove dependents later



ENFORCE COMPLIANCE

Improve compliance with your Summary Plan Descriptions (SPDs), HR policies and rules



MINIMIZE RISK

Reduce stop-loss exposure and litigation risk related to ERISA, Sarbanes-Oxley and other regulations



ACCELERATE ROI

With DependentIQ, we're able to cut average time-to-audit by 60%, helping you see cost savings sooner

KEY FEATURES

AI/ML Instant Verification

DependentIQ uses advanced image recognition and AI/ML technology to automatically recognize and verify uploaded employee documents for eligibility requirements – providing instant results and eliminating 70% of HR admin intervention.

HR Dashboard

View company verification activities and information from a single screen, including all pending and completed requests. Any documents that can't be automatically verified will appear here for an easy and centralized approval workflow.

Communications

We'll handle all communication with employees, keeping your HR team out of the weeds and out of uncomfortable interactions that could result in employee resentment, disengagement or negative culture impacts.

Configurable Rules

Build on top of our default rule sets to customize approval rules by document type, job role, seniority, employee population and more, so you can control the experience and where coverage is enacted.

Mobile Upload

Our mobile-friendly tools make it fast and easy for employees to add required eligibility documents. They can simply snap a photo of the document from their phone, then upload into the system – no faxing, scanning or mailing required!

6%

AVERAGE INELIGIBLE
DEPENDENT RATE
FOR FULL AUDIT

10%

AVERAGE INELIGIBLE
DEPENDENT RATE
FOR ONGOING

\$3,500

AVERAGE ANNUAL
SAVINGS PER
DEPENDENT REMOVED

17x

AVERAGE ROI
FROM DEPENDENTIQ
ADD-ON ALONE



"Overall, our audit was a huge success and the cost savings to the district were 7x greater than what we projected."

LISA STEED

Benefits Supervisor, Grand Rapids Public Schools

FREE 90-DAY TRIAL OFFER FOR DEPENDENTIQ

EXCLUSIVE OFFER FOR HUB CUSTOMERS

We're launching an exclusive offer for HUB's current and prospective clients, a free 90-day trial of DependentIQ. With DependentIQ, your customers can instantly verify dependents with our powerful AI/ML technology. This trial offer is ideal for customers who use common dependent eligibility practices that include the verification of birth certificates and marriage certificates.

QUALIFICATIONS FOR FREE TRIAL

- Customers of HUB
- New or existing customers of PlanSource
- Customers with 500+ benefit-eligible employees
- Open enrollment is not scheduled within the 90-day trial*
- Customer is not currently using the PlanSource dependent verification service for ongoing verification
- The free trial is not available for customers while conducting a full audit.

HOW IT WORKS

- PlanSource will meet with the customer for 30-60 minutes to review their requirements and enable the DependentIQ solution
- For new customers, the free trial of DependentIQ will be enabled for 90 days from when the customer goes live*
- For existing customers, DependentIQ 90-day trial will begin on an agreed upon start date*
- Self-service training tools will be provided to the customer

**HELP YOUR CUSTOMERS SAVE ~\$3,500 PER YEAR PER DEPENDENT REMOVED.
THIS TRIAL OFFER IS ONLY AVAILABLE FOR A LIMITED TIME SO DON'T DELAY!**

**GO TO [PLANSOURCE.COM/FREE-TRIAL](https://plansource.com/free-trial) TO CLAIM
YOUR CUSTOMER'S FREE TRIAL TODAY!**

**AVAILABLE
FOR A LIMITED
TIME**

This offer is subject to change.

*Customer can use DependentIQ at no cost for up to 90 days, but not during their open enrollment or during a full audit. If within the 90-day trial period a customer has an open enrollment, DependentIQ will be turned off prior to the open enrollment start date.