



PLANSOURCE

Helping people live happier, healthier lives by
maximizing the benefits of their benefits

Sunglow Release Preview

SUNGLOW RELEASE PREVIEW



Jamie Showalter
Director, Product Management



Darren Lucas
Senior Product Manager



Madison Grasty
Product Manager



Brantley Saunders
Product Marketing Manager

AGENDA

2021 Refresher

Admin & Employee Experience

PlanSource IQ Suite

Integrations & Partner Updates

Marketing Updates

SUNGLOW RELEASE THEMES



Enhanced Admin & Employee
Experience



Greater visibility into system ROI



Increased speed of dependent
verification with AI



Simplified Transactions for UKG

PRODUCT VISION FOR THE FUTURE



MODERNIZE THE CUSTOMER EXPERIENCE IN 3 KEY AREAS:

Removing Friction between employers
& employees in the Marketplace

Modernizing the way data is transferred
in the industry

Using new technology to help Employees
pick the right plan



BY INVESTING IN:

Boost Carrier Partner Program

Partner Integrations

New Product Modules

Efficiency Tools

Technology and Security

2022 RELEASE SCHEDULE

Continuous Investment and Innovation



SUNGLOW

April 7, 2022



CELADON

August 11, 2022



CERULEAN

January 2023

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

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

Zenith Release

UPDATES TO MANAGE ADMIN & WORK STATUS EVENTS

PLAN COMPARISON & ESTIMATED COST IN DECISIONIQ

FORGOTTEN PASSWORD WORKFLOW

THRIVE HOSPITALITY

Work Status Processing

Name	Event	Actions	Status	* Date of Change
Karson, Rosie	Loss of Eligibility - Voluntary Spouse Life	0 actions taken, 0 failed	Open	09/14/2021
Carsen, Lydia	Loss of Eligibility - Voluntary Spouse Life	0 actions taken, 0 failed	Open	09/14/2021
Harri, William	Loss of Eligibility - Voluntary Spouse Life	0 actions taken, 0 failed	Open	09/14/2021
Byrge, Fern	Address Change	0 actions taken, 0 failed	Open	09/14/2021
Beckett, Nina	Address Change	2 actions taken, 1 failed	Open	09/14/2021
Brewer, Ethan	Loss of Eligibility - Health Savings Account	2 actions taken, 1 failed	Open	09/14/2021
Sartin, Larry	Loss of Eligibility - Health Savings Account	0 actions taken, 0 failed	Open	09/14/2021
Olsen, Tilde	Loss of Eligibility - Basic Employees Life	0 actions taken, 0 failed	Open	09/14/2021
Leonard, Abbie	Loss of Eligibility - Medical	0 actions taken, 0 failed	Open	09/14/2021
Karson, Hunter	Loss of Eligibility - Medical	0 actions taken, 0 failed	Open	09/14/2021

Select an Event Action: Apply to selected Process page: 14 of 10 of 10

Bulk Actions: 3 Selected

MetLife

Medical Plan 3

\$230.77
Per Pay Period

Estimated annual cost: \$8,365.96

MetLife

Medical Plan 1

\$327.69
Per Pay Period

Estimated annual cost: \$10,379.67

COST BREAKDOWN

Plan	Premium	Deductible
Medical Plan 3	\$8,365.96	\$2,000.00
Medical Plan 1	\$10,379.67	\$1,500.00

FLEXIBLE SPENDING ACCOUNT (FSA)

This plan is eligible for a Flexible Spending Account.

Eligible FSA types:

Medical Purpose FSA (PFSAs) 0

Health Savings Account Eligible

Is this plan eligible for a Health Savings Account?

Yes

Annual Deductible

Plan	Annual Deductible
Medical Plan 3	\$1,500 single / \$3,000 family
Medical Plan 1	\$1,500 single / \$3,000 family

PLANSOURCE

What do you need help with?

- ☒ I forgot my username
- ☐ I forgot my password

Last name

Smith

Date of birth

12/31/2021

Last four digits of your social security number

Your security is important

Your responses will not be shared or collected for any other purpose.

Recover Username

A Look Back

Jamie Showalter

2021 LOOK BACK

Thank you for your partnership and collaboration

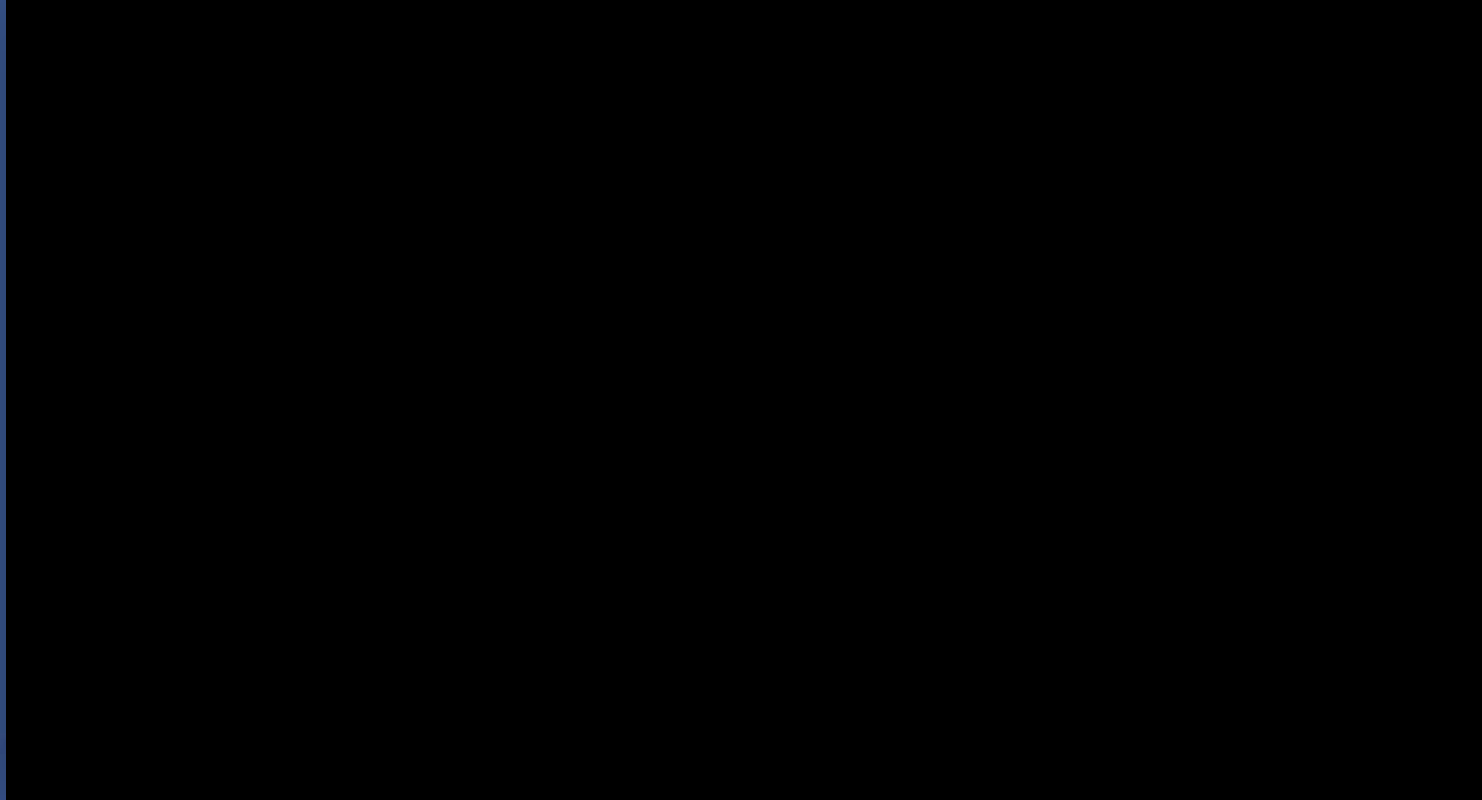
PRODUCTS ENHANCEMENTS

- IQ Series Launch
- New Partnership with Sage, Trinet
- 14 Boost integrations
- Custom-Branded Login Experience

PERFORMANCE ENHANCEMENTS

- Successfully handled **30%** more load on system during OE peak
- Increased speeds by **75%** on the most visited pages from 8 seconds to 2 seconds
- Increased average employee search speeds by **62%** from 13 seconds to 5 seconds

2021 FEATURE: CUSTOM LOG-IN



PlanSource Boost

PLANSOURCE BOOST

Providing real-time modern API Integrations



PLAN CONFIGURATION

Automates the setup and renewal process, eliminating errors and saving time



ENROLLMENT TRANSACTIONS

Eliminates traditional batch EDI files, turns a weekly process into real-time function



EVIDENCE OF INSURABILITY

Allows employees to complete EOI within the shopping experience instead of sending paper forms



MEMBER PORTAL & PROVIDER DIRECTORY

Employees can easily search for and select dental providers within PlanSource

2022 BOOST ROADMAP*

APIs coming in 2022 with Boost carriers

Q1 2022

AMERITAS
Provider Directory SSO

PRUDENTIAL
Member Portal SSO

Q2 2022

AMERITAS
Member Portal SSO &
Enrollment API

HARTFORD
Enrollment API

PRUDENTIAL
Enrollment API

UNUM
EOI Decision Notification &
Enrollment API

Q3 2022

CIGNA
Member Portal SSO

MUTUAL OF OMAHA
EOI SSO, EOI Decision
Notification, Provider Directory
SSO &
Member Portal SSO

THE STANDARD
EOI SSO & EOI Decision
Notification

Q4 2022

ALLSTATE BENEFITS
Enrollment API & Member Portal SSO

AMERITAS
Plan Config API

CIGNA
Provider Directory SSO

HARTFORD
Plan Config API

METLIFE
Enrollment API

MUTUAL OF OMAHA
Enrollment API & Plan Config API

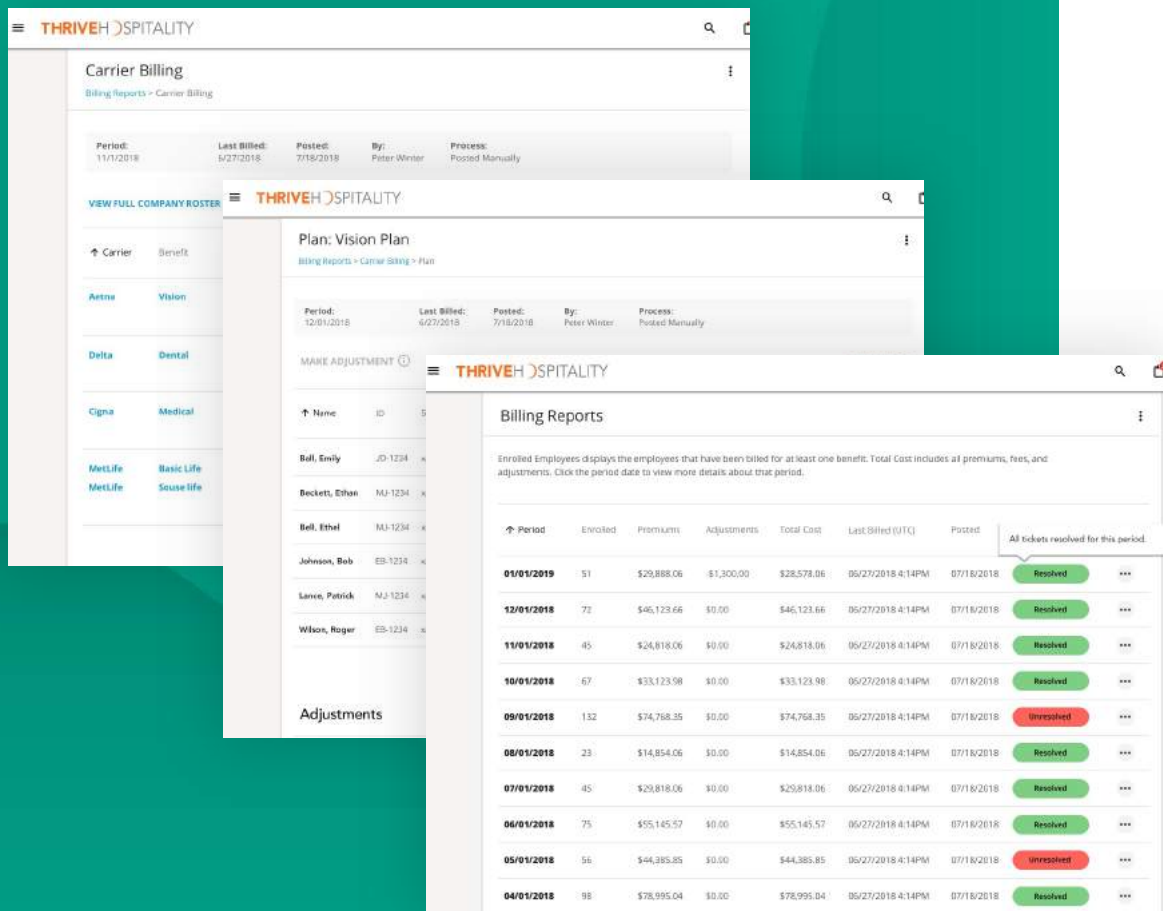
PRUDENTIAL
Plan Config API

RELIANCE STANDARD
Enrollment API

UNUM
Plan Config API

CHECK OUT
[PLANSOURCE.COM/BOOST](https://plansource.com/boost)
FOR THE LATEST

HR & Employee Experience



HR Admin – Premium Billing Module Refresh

- Updated look & feel
- Part of our continued effort to update the HR Admin Experience

HR Admin Refresh: BenAdmin Report improvements



UPDATES TO OUR MOST POPULAR REPORTS

Benefit Report
Subscriber Eligibility Report
Validation Report
Document Request
Processing Report
Shopping Cart Report



ADDITIONAL FILTERS ADDED

Dependent Information,
Relationship, QMSCO & more
(Doc Request Processing Report)
Available Plan Fields, Benefit
Type (Benefit Report)



BASED ON CUSTOMER FEEDBACK

Over the last year, we have
studied your comments and
added filters to make the
reporting easier for you
based on that feedback

Home
Profile
Benefits
Open Enrollment
Documents

THRIVE HOSPITALITY

Welcome John

\$87.45 Cost per pay period

Cigna HDHP

Added to Cart

1 of 12 Benefits Complete

Enroll in a Health Savings Account

A Health Savings Account – or HSA – is a savings account used to put pre-tax dollars aside your out-of-pocket health expenses. Like a regular savings account, your HSA earns interest to keep if you leave Thrive Hospitality.

[View More](#)

Health Savings Account

< To Available Plans

Select Your Contributions

☒ Annual
 ☐ Per Pay Period

IRS Maximum Contribution limits
Annual: \$3,550.00 | Per Pay Period (26) : \$136.53

Annual Personal Contribution: <input type="text" value="\$1,000.00"/> <small>Minimum \$1.00 Maximum \$3,550.00</small> ↑ Maximize My Contribution	+	Annual Employer Contribution: <input type="text" value="\$500.00"/> <small>Includes One-time and Per Pay Period contributions.</small>
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Total Contribution:

Includes Personal and Employer contributions.

Personal Contributions: \$1,000.00
\$1,000.00 Annual Contribution = \$38.46 Per Pay Period Contribution starting 1/14/2022

Employer Contribution: \$500.00
\$500.00 Annual Contribution = \$19.23 Per Pay Period Contribution starting 1/14/2022

Select Your Contributions

☐ Annual
 ☒ Per Pay Period

IRS Maximum Contribution limits
Annual: \$3,550.00 | Per Pay Period (26) : \$136.53

Per Pay Period Personal Contribution: <input type="text" value="\$38.46"/> <small>Minimum: \$1.00 Maximum \$136.53</small> ↑ Maximize My Contribution	+	Per Pay Period Employer Contribution: <input type="text" value="\$19.23"/> <small>Includes One-time and Per Pay Period contributions.</small>
---	---	--

Total Per Pay Period Contribution:

Includes Personal and Employer contributions.

Personal Contributions: \$1,000.00
\$1,000.00 Annual Contribution = \$38.46 Per Pay Period Contribution starting 1/14/2022

Employer Contribution: \$500.00

Health Savings Account

\$80.00
Cost per pay period

[Update Card](#)

[Decline Benefit](#)

HSA Enrollment Refresh

PlanSourceIQ Suite

Darren Lucas, Senior Product Manager

IQ SUITE OF PRODUCTS

Designed to deliver hyper-personalized experiences and greater HR efficiency



DECISIONIQ

Prescriptive, AI-based decisions engine



DEPENDENTIQ

Instant, AI-powered eligibility verification




INSIGHTSIQ

Powerful benefit insights at your fingertips

New Document Request Rule

Triggers: [Add New Trigger](#)

*Rule Name:

Request Text:  **PAGE TEXT**

Applies to Dependent Verification: ☒

▼ * Primary Documents

Documents Processed by DependentIQ:

Documents Requiring Manual Approval:

Number of Document(s) Required:

▼ Supporting Documents

Documents Processed by DependentIQ:

Documents Requiring Manual Approval:

Number of Document(s) Required:

Pend Coverage:

Terminate coverage if unfulfilled within:

Choose number of Day(s):

Combine Requests: ☒

[Cancel](#) [Save](#)

DependentIQ

New IQ models to verify the relationship of a spouse or domestic partner.

- Federal tax returns
- Joint bank or credit account statements
- Joint mortgage or lease documents
- Joint property tax assessments
- Motor vehicle ownership records
- Utility bills listing a common address

New Document Request Rule

Triggers: [Add New Trigger](#)

*Rule Name:

Request Text: [PAGE TEXT](#)

Applies to Dependent Verification: ☒

▼ * Primary Documents

Documents Processed by DependentIQ:

Documents Requiring Manual Approval:

Number of Document(s) Required:

▼ Supporting Documents

Documents Processed by DependentIQ:

Documents Requiring Manual Approval:

Number of

Benefits & Family Actions

Benefits (0) Family (3)

Name	Relationship	Age	SSN	Gender	DependentIQ Status
Joshua Austin	Spouse	34		Male	Not Verified
Steven Joshua Austin	Child	4		Male	Verified
Brandy Austin	Child	0		Female	Not Started

☐ Show Inactive

DependentIQ

Improved process when multiple proof documents are preferred.

- Able to identify documents types and quantity required in the same rule
- Redesigned task page that consolidates all documents on the same page
- New status that automatically tracks the verification process

DEPENDENTIQ | ROI DASHBOARD

Provides Key Metrics to Show What DependentIQ Has Assisted With



CURRENT COUNT

of dependents



DEPENDENTIQ STATUS

of each dependent



ESTIMATED TIME SAVINGS

from automation



ESTIMATED PREMIUM SAVINGS

from preventing
ineligible dependents
from being added to
coverage

Demo



Plan Year

01/01/2023 - 12/31/2023

Create New Plan Year

Employer Information

Plan Year

01/01/2023 - 12/31/2023

Defined Benefit Contributions

01/01/2023 - 12/31/2023

Payroll Schedules

New Hire Rules

01/01/2023 - 12/31/2023

Dependent Relationships

Define Benefits

01/01/2023 - 12/31/2023

Define Benefit Plans

01/01/2023 - 12/31/2023

Employee Groups

Data Field Captions

Data Field Security

Populations

Plan Eligibility

01/01/2023 - 12/31/2023

Define Costs

01/01/2023 - 12/31/2023

Carrier Billing

Life Events

Life Event Benefits

01/01/2023 - 12/31/2023

Document Request Rules

01/01/2023 - 12/31/2023

Page Content

01/01/2023 - 12/31/2023

ACA Cycles

Automation Configuration

Document Request Rules - 01/01/2023 - 12/31/2023

Configuration Status

This configuration task was marked as completed at 05/07/2021 08:55:48 by Stokes, Lance.

Tickets: Open(0), Closed(0), Add Ticket

☒ Mark as Completed

Language: English (US)

Active

Inactive

											Actions
<input type="checkbox"/>	Rule Name	Applies to Dependent Verification	Pend Coverage(s)	Auto Approve Document Request	Term. Action	Term. Period	Created	Created By User	Updated	Updated By User	Action
<input type="checkbox"/>	DependentIQ Child Verification	Yes	Until Approval	No	Days From Document Request	30 day(s)	05/10/2021 10:00 AM	lucas, darren	01/31/2022 11:34 AM	lucas, darren	Edit Delete
<input type="checkbox"/>	DependentIQ Spouse Verification	Yes	Until Approval	No	Days From Document Request	30 day(s)	05/10/2021 10:00 AM	lucas, darren	01/31/2022 11:34 AM	lucas, darren	Edit Delete
<input type="checkbox"/>	DependentIQ Student Verification	Yes	Until Approval	No	Days From Document Request	30 day(s)	01/31/2022 11:44 AM	lucas, darren	01/31/2022 02:19 PM	lucas, darren	Edit Delete
<input type="checkbox"/>	DependentIQ Disabled Dependent Verification	Yes	Until Approval	No	Days From Document Request	30 day(s)	01/31/2022 11:49 AM	lucas, darren	01/31/2022 11:49 AM	lucas, darren	Edit Delete

Back

Add Rule

Document Types

> Save & Continue

Configure Subscriber Email

Document Request Approve

☐ Suppress Emails

Document Request Reject

☐ Suppress Emails

Document Request Reject and Reissue

☐ Suppress Emails

Document Request Reject/Deny and Issue New

☐ Suppress Emails

Document Request Create New

☐ Suppress Emails

Document Request Rules - 01/01/2023 - 12/31/2023

Plan Year

01/01/2023 - 12/31/2023

Create New Plan Year

Employer Information

Plan Year

01/01/2023 - 12/31/2023

Defined Benefit Contributions

01/01/2023 - 12/31/2023

Payroll Schedules

New Hire Rules

01/01/2023 - 12/31/2023

Dependent Relationships

Define Benefits

01/01/2023 - 12/31/2023

Define Benefit Plans

01/01/2023 - 12/31/2023

Employee Groups

Data Field Captions

Data Field Security

Populations

Plan Eligibility

01/01/2023 - 12/31/2023

Define Costs

01/01/2023 - 12/31/2023

Carrier Billing

Life Events

Life Event Benefits

01/01/2023 - 12/31/2023

Document Request Rules

01/01/2023 - 12/31/2023

Page Content

01/01/2023 - 12/31/2023

ACA Cycles

Automation Configuration

Configuration Status

This configuration task was marked as completed at

Tickets: Open(0), Closed(0), Add Ticket

☒ Mark as Completed

Language: English (US)

Active

Inactive

<input type="checkbox"/>	Rule Name	Applies to D
<input type="checkbox"/>	DependentIQ Child Verification	Yes
<input type="checkbox"/>	DependentIQ Spouse Verification	Yes
<input type="checkbox"/>	DependentIQ Student Verification	Yes
<input type="checkbox"/>	DependentIQ Disabled Dependent Verification	Yes

Back

Add Rule

Document Types

Configure Subscriber Email

Document Request Approve

Document Request Reject

Document Request Reject and Reissue

Document Request Reject/Deny and Issue New

Document Request Create New

New Document Request Rule

Triggers:

Add New Trigger

*Rule Name:

Request Text:

PAGE TEXT

Applies to Dependent Verification:

☒

▼ * Primary Documents

Documents Processed by DependentIQ:

Documents Requiring Manual Approval:

Number of Document(s) Required:

▼ Supporting Documents

Documents Processed by DependentIQ:

Documents Requiring Manual Approval:

Number of Document(s) Required:

Birth Certificate
Marriage Certificate
Domestic Partner Affidavit
Bank or Credit Account Statement
Federal Tax Return
Joint Mortgage or Lease
Joint Ownership of a Motor Vehicle
Utility Bill Listing Common Address
Joint Property Tax Assessment

Pend Coverage:

Do Not Pend Coverage

Auto Approve Document Request Once Document is uploaded:

Formula

Terminate coverage if unfulfilled within:

Open Period Formula:


Combine Requests:

☒

Cancel

Save

Tasks

Actions 

↑ Task

Status

↓ Expiration

Dependent IQ: Willson Emerson

1 Needs Review

04-06-2022

Dependent IQ: Willson Kenith

1 Needs Review

04-06-2022

Rows per page: 10 ▾ 1-2 of 2

Benefits & Family

Actions 

Benefits (0)

Family (3)

Name


Relationship

Age

SSN

Gender

DependentIQ Status

 **Kenith Willson**

Spouse

35

864-22-2221

Male

Being Verified

 **Skylar Michael Willson**

Child

7

458-33-3331

Male

Verified

 **Emerson Willson**

Child

0

845-55-5551

Male

Not Started

☐ Show Inactive

X Verify Dependents with DependentIQ

Dependent Document Requests 1 of 2 Needs Review

! Document Requires Approval



Utility Bill Listing Common Address

Upload Document

Dependent Name

Kenith Willson

Certainty

Does not meet threshold

Date

07/03/2022

Processed By:

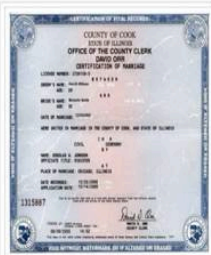
Dependent IQ

Approve

Reject

Show Comments (0)

✓ Auto-Approved by DependentIQ



Marriage Certificate

Upload Document

Dependent Name

Kenith Willson

Certainty

Meets threshold

Date

07/03/2022

Processed By:

Dependent IQ

Edit

Show Comments (0)



Verify Dependents with DependentIQ

Dependent Document Requests 1 of 2 Needs Review

Document Requires Approval



Utility Bill Listing Common Address

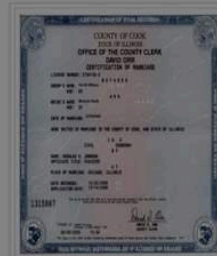
Dependent Name	Certainty	Date
Kenith Willson	Does not meet threshold	07/03/2022

Approve

Reject

▼ Show Comments (0)

Auto-Approved by DependentIQ



Marriage Certificate

Dependent Name	Certainty	Date
Kenith Willson	Meets threshold	07/03/2022

Edit

▼ Show Comments (0)



Rejection Details

Marriage Certificate listing date of marriage needed

☐ Marriage Certificate listing date of marriage needed

☐ Item not dated within allowable time frame

☐ Item must show dependent's address

☐ Affidavit incomplete

☐ Affidavit not provided

☐ Affidavit not signed/dated

☐ Domestic Partner affidavit required

☐ Birth Adoption Certificate listing dependent name required

☐ Hospital record of birth not acceptable, require government birth certificate

External Comments

Enter a comment about this document rejection.

Internal Comments

Enter a comment about this document rejection.

Submit

Cancel

DecisionIQ

Summary of Benefits and Coverages (SBC) Scanner for Dental Plans

- Eliminates manual input of plan detail information
- AI extracts the fields and enters them into the system for review
- Available for: Anthem, Cigna, Guardian, and MetLife

X Import Plan Content

☒ Scan an SBC Automated

Upload this plans Summary of Benefits (SBC). The SBC will be scanned and populate content automatically. The SBC must be in a PDF format, and match the [ACA dictated specifications](#).

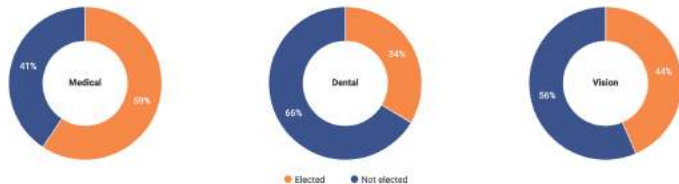
Choose an SBC No file chosen

☐ Link to a Template or Client Automated

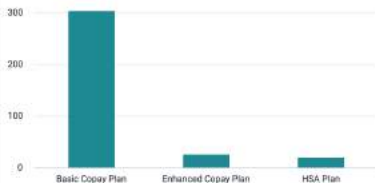
☐ Upload in XML format Manual

DecisionIQ Return on Investment

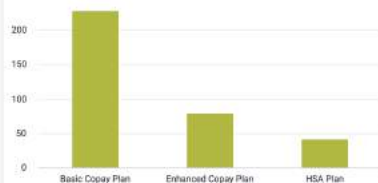
How many employees elected the best match for each benefit? ⓘ



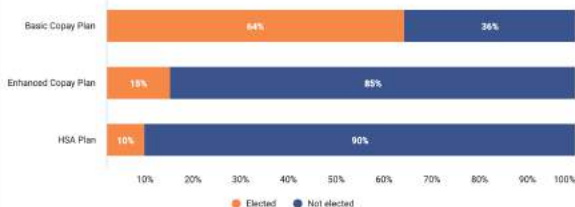
How often is each medical plan the best match? ⓘ



What medical plans are being elected? ⓘ



What is the overall success rate of the best match medical plans? ⓘ



On the left you can see the elected & not elected count/percent of each best match plan.

Elected = The total employees who have elected the best match plan.

Not elected = The total employees who have not elected the best match plan.

DecisionIQ

ROI Dashboard

- Provides key metrics to show how employees are responding to DecisionIQ matches
- Metrics include: How often best matches are chosen, what plans are being elected, and more!

Demo

DecisionIQ Return on Investment

DecisionIQ suggests a best match plan to your employees based on their total estimated out of pocket expenses calculated by Milliman. This dashboard provides insight into if your employees elected the matched plan or not.

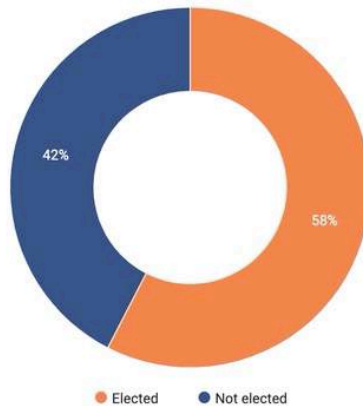
438

Benefits Eligible Employees ⓘ

73

Benefits Declined ⓘ

Overall, how many employees elected the match? ⓘ



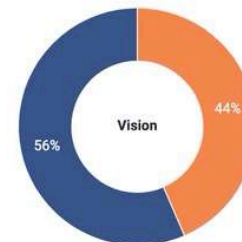
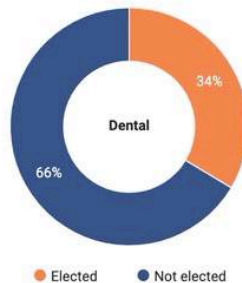
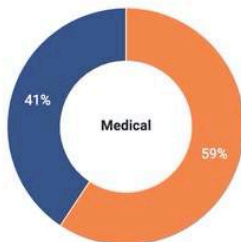
202

Total Best Match Elected ⓘ

149

Total Best Match Not Elected ⓘ

How many employees elected the best match for each benefit? ⓘ



DecisionIQ Return on Investment

DecisionIQ suggests a best match plan to your employees based on their total estimated out of pocket expenses calculated by Milliman. This dashboard provides insight into if your employees elected the matched plan or not.

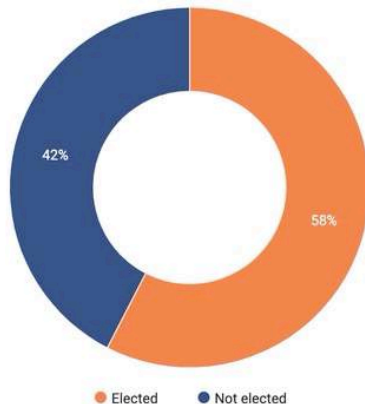
438

Benefits Eligible Employees ⓘ

73

Benefits Declined ⓘ

Overall, how many employees elected the match? ⓘ



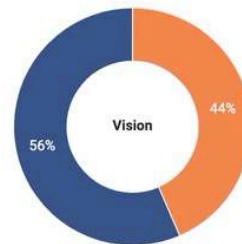
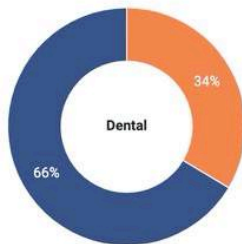
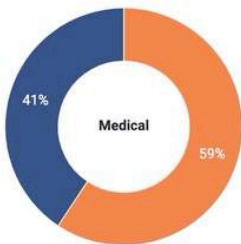
202

Total Best Match Elected ⓘ

149

Total Best Match Not Elected ⓘ

How many employees elected the best match for each benefit? ⓘ



Best Match Medical Plans

This section provides insights into medical plan matches. Within it you can explore the percent of employees who have either elected or not elected the best match medical plan, top best match plans, the top elected plans by the employees, and more.

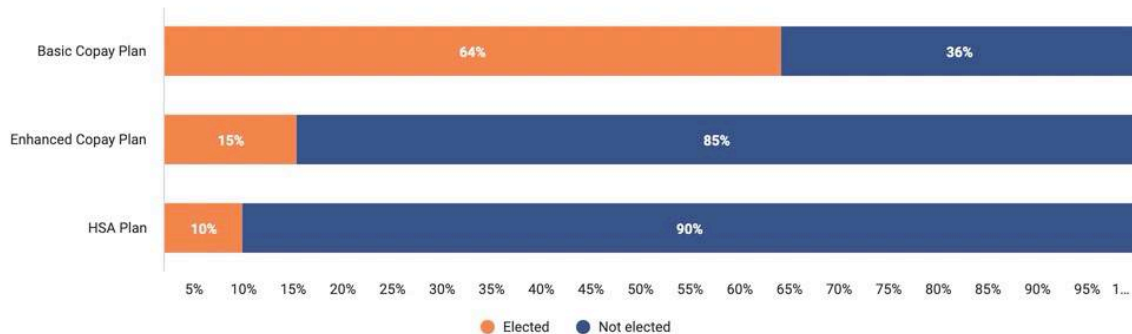
How often is each medical plan the best match? ⓘ



What medical plans are being elected? ⓘ



What is the overall success rate of the best match medical plans? ⓘ



On the left you can see the elected & not elected count/percent of each best match plan.

Elected = The total employees who have elected the best match plan.

Not elected = The total employees who have not elected the best match plan.

InsightsIQ

Identify trends and see how your benefits are being elected

Executive Summary

Overview of employees, benefits, participation and costs to provide an at-glance summary

Open Enrollment

Real-time OE election tracking to respond as OE progresses

Employee Demographics

Breakdown of how your population is distributed to understand needs and fit

Benefit Costs

Distribution of costs per benefit between employer and employee, benchmarked against similar sized companies



Demo

Employee

InsightsIQ **BETA**

Data & Tools

System Administration

InsightsIQ

Employee Overview

Open Enrollment

Population Demographics

Employee Overview

Timeframe

Select to View Eligibility Overall or for a Specific Benefit Type

Benefit Type

is from 2020/01/01 until 2022/03/04

Benefits Eligibility Overall

Eligibility for a Benefit Type

No matches found

This is a high level overview of your company's workforce and its fluctuation over time.

1,495

Total Employees

-3.3%

Growth in Last 3 Months

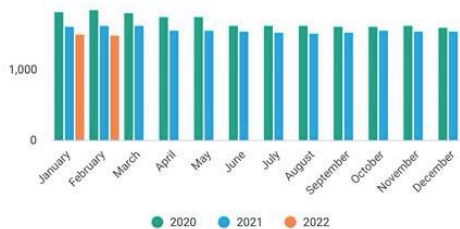
-2.2%

Growth in Last 6 Months

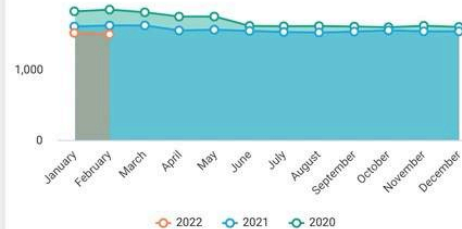
-8.3%

Growth in Last 12 Months

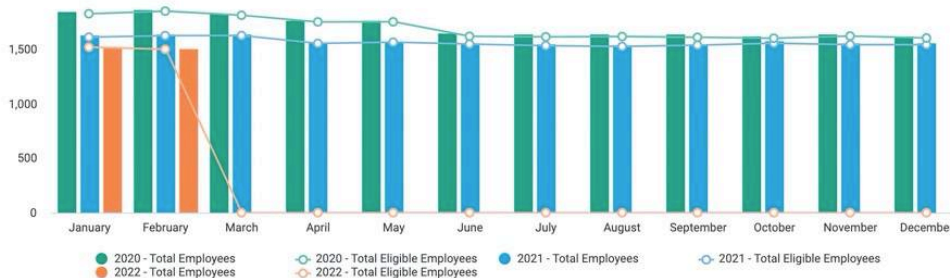
Total Employees



Benefits Eligible Employees



Total Employees and Benefits Eligibility



1,495

Total Employees ⓘ

-3.3%

Growth in Last 3 Months ⓘ

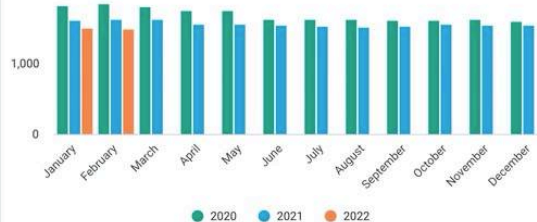
-2.2%

Growth in Last 6 Months ⓘ

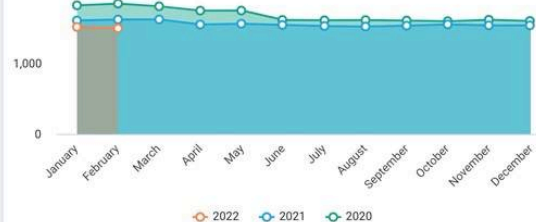
-8.3%

Growth in Last 12 Months ⓘ

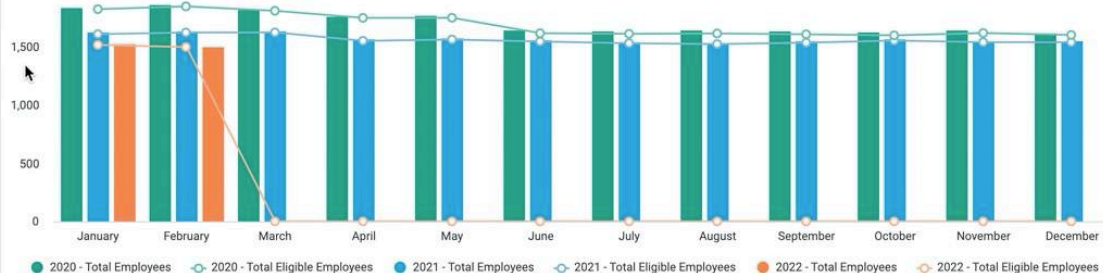
Total Employees ⓘ



Benefits Eligible Employees ⓘ



Total Employees and Benefits Eligibility ⓘ



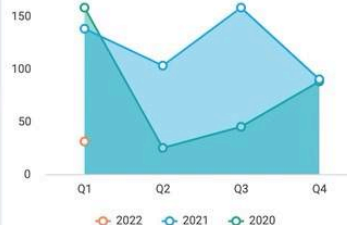
836

New Hires ⓘ

1,123

Terminations ⓘ

New Hires ⓘ



Terminations ⓘ



Integration & Partnership Updates

Madison Grasty, Product Manager

(UKG) Resync & Restart for Failed Deduction, Earning, and Lump Sum Transactions

The screenshot displays a table with the following columns: Employee ID, Subscriber Name, Subscriber ID, Deduction Code, Time of Request, Last Resync, Message, and Status. Two rows are visible, both for Mark Berg with Subscriber ID 98531336. The first row has Deduction Code HSA and the second has VLT D1. Both rows show a 'View' link and a 'New' button. Below the table, a 'Choose Bulk Action' dropdown menu is open, showing options: New, Under Review, Resolved, and Resync Selected. A red arrow points to the 'Resolved' option. An 'Apply to Selected' button is also visible. The text 'Showing 1 - 2 of 2' is at the bottom right of the table area.

<input type="checkbox"/>	Employee ID	Subscriber Name	Subscriber ID	Deduction Code	Time of Request	Last Resync	Message	Status
<input checked="" type="checkbox"/>	4K9QML000EYE	Mark Berg	98531336	HSA	01/24/22 07:12:31 AM	01/24/22 07:12:33 AM	View	New
<input checked="" type="checkbox"/>	4K9QML000EYE	Mark Berg	98531336	VLT D1	01/24/22 07:10:11 AM	01/24/22 07:12:22 AM	View	New

Choose Bulk Action

- New
- Under Review
- Resolved
- Resync Selected

Apply to Selected

Showing 1 - 2 of 2

Resync allows Admins to retry failed transactions on demand. It will also mark later transactions as "Resolved - Auto" to reduce noise on the API Transaction Tracker.

Restart automates the process of failed transactions being restarted. It will also mark later transactions as "Resolved – Auto" to reduce noise on the API Transaction Tracker.

(UKG) Payroll Schedules (Notifications & Usability)

Enhancements to our Payroll Schedule Sync feature to provide more visibility to Admins and a better user experience

#5288968: Processing of UKG Import Payroll Schedule is complete (Status: Open)

[Back](#) [Edit Ticket](#)

Created by: Sankhala, Shivani - Feb 14 2022 * 04:37 AM
Ticket Type: UKG Import Payroll

Description

UKG Import Payroll has finished with changes.

Attached Files

sync_payrolls_20220214_013715_UYEK.csv	UKG Import Payroll Report	Sankhala, Shivani - 02/14/2022 04:37 AM
--	---------------------------	---

Comments

[Add comment and/or close ticket](#)

Name mgrasty
Email Madison.Grasty@plansource.com
Comment

Status
Assign to
[Save](#)

Schedule	First Payroll	First Check D	Plan Year	Total Payday	Deduction Pa	Population
BC011BW	1/7/22	1/14/22	01/01/2022	26	26	
Payroll Sched	Payroll Sched	Pay Date	Pay Date Sta	Pay Date Enc	Includes Ded	Status
31271432	CO11BW	1/14/22	12/25/21	1/7/22	YES	Unchanged
31271944	CO11BW	1/28/22	1/8/22	1/21/22	YES	Unchanged
31272456	CO11BW	2/11/22	1/22/22	2/4/22	YES	Unchanged
31272968	CO11BW	2/25/22	2/5/22	2/18/22	YES	Changed
31273480	CO11BW	3/11/22	2/19/22	3/4/22	YES	Changed
31273992	CO11BW	3/25/22	3/5/22	3/18/22	YES	Changed
31274504	CO11BW	4/8/22	3/19/22	4/1/22	YES	Changed
31275016	CO11BW	4/22/22	4/2/22	4/15/22	YES	Changed
31275528	CO11BW	5/6/22	4/16/22	4/29/22	YES	Changed
31276040	CO11BW	5/20/22	4/30/22	5/13/22	YES	Changed
31276552	CO11BW	6/3/22	5/14/22	5/27/22	YES	Changed
31277064	CO11BW	6/17/22	5/28/22	6/10/22	YES	Changed
31277576	CO11BW	7/1/22	6/11/22	6/24/22	YES	Changed
31278088	CO11BW	7/15/22	6/25/22	7/8/22	YES	Changed
31278600	CO11BW	7/29/22	7/9/22	7/22/22	YES	Changed
31279112	CO11BW	8/12/22	7/23/22	8/5/22	YES	Changed
31279624	CO11BW	8/26/22	8/6/22	8/19/22	YES	Changed
31280136	CO11BW	9/9/22	8/20/22	9/2/22	YES	Changed
31280648	CO11BW	9/23/22	9/3/22	9/16/22	YES	Changed
31281160	CO11BW	10/7/22	9/17/22	9/30/22	YES	Changed
31370760	CO11BW	10/21/22	10/1/22	10/14/22	YES	Changed
31371272	CO11BW	11/4/22	10/15/22	10/28/22	YES	Changed
34524168	CO11BW	11/18/22	10/29/22	11/11/22	YES	Changed
31372296	CO11BW	12/1/22	11/12/22	11/25/22	YES	Changed
34524680	CO11BW	12/16/22	12/26/22	12/9/22	YES	Changed
34525192	CO11BW	12/30/22	12/10/22	12/23/22	YES	Changed

Marketing Updates

PLANSOURCE MARKETPLACE PARTNERS

A curated list of strategic partners designed to maximize HR efficiency, employee engagement and plan participation



Personalized coaching
service for employees



Prevention and treatment
of cancer and genetic diseases



Charitable
Giving Platform



Family health benefit (fertility,
pregnancy, adoption)



Easy access to attorneys for
common legal issues



Cyber Safety &
Identity Protection

THE BASICS OF THE PARTNER MARKETPLACE

Quick Implementation
through out of the box templates

Templated File Delivery
for expedited data exchange

Employee Shopping Experience
with optimized page content to
drive engagement

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5 Ways Ben Admin
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Reporting &
Compliance



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How to Engage
Employees and
Reduce Turnover
with Total
Compensation
Statements



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Benefits Trends
& Predictions HR
Leaders Need to
Know in 2022



FEB 9

Benefits
Outsourcing:
Focus on HR
Strategy and
Hitting Your
Goals



MAR 9

2022 Benefits
Benchmark Report
Sneak Peak

Release Communications

RELEASE COMMUNICATIONS

Learn more about the Sunglow Release



RELEASE WEBPAGE

plansource.com/releases



RELEASE NOTES

Will be available
March 24, 2022



SUNGLOW RELEASE GO LIVE

Thursday, April 7
Downtime:
Midnight – 8 a.m. ET



UPDATED PSU COURSE

Will be available
April 7, 2022

Q&A