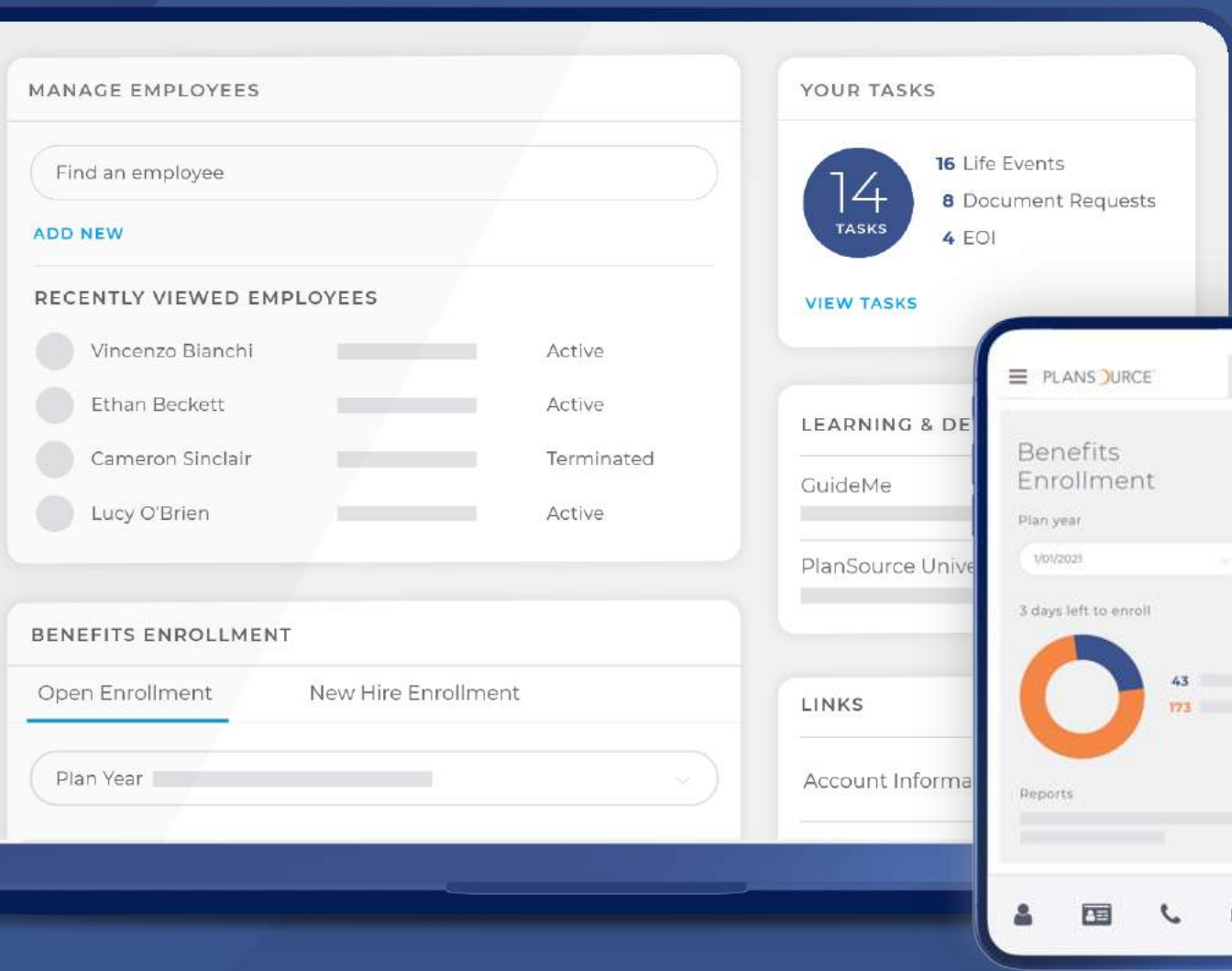




How To Save 70% of Manual HR Effort with a Dependent Verification Tool



PLANSOURCE

Spend less time
managing employee
benefits

Automate and simplify every
aspect of your benefits program
with PlanSource

Today's Speakers



Brantley Saunders
Product Marketing Manager
PlanSource



Darren Lucas
Senior Product Manager
PlanSource

TODAY'S AGENDA

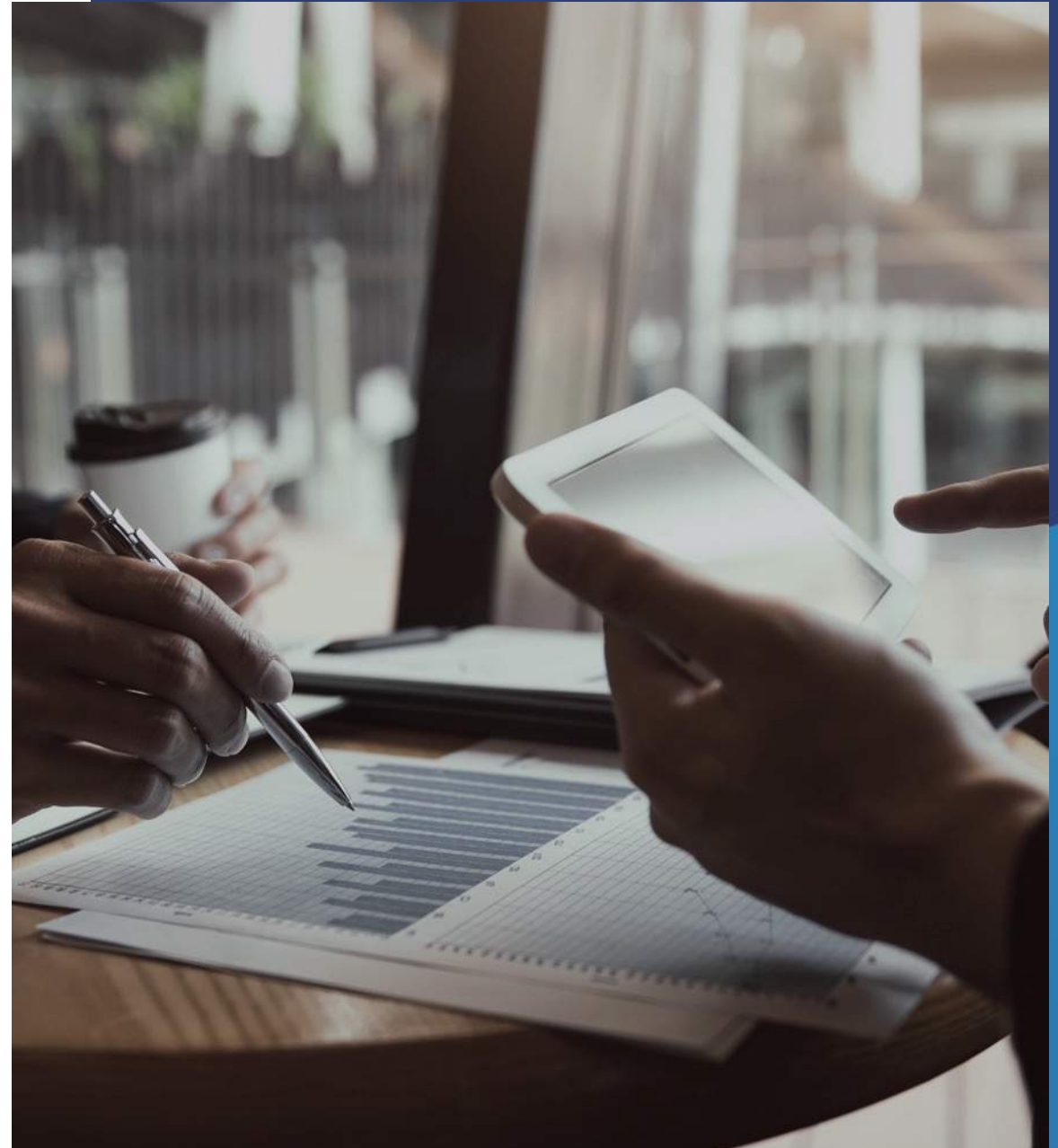
Overview of Eligibility Verification

Difference Between Initial
and Ongoing Audits

Dependent Verification
Misconceptions

DependentIQ Demo

Q&A

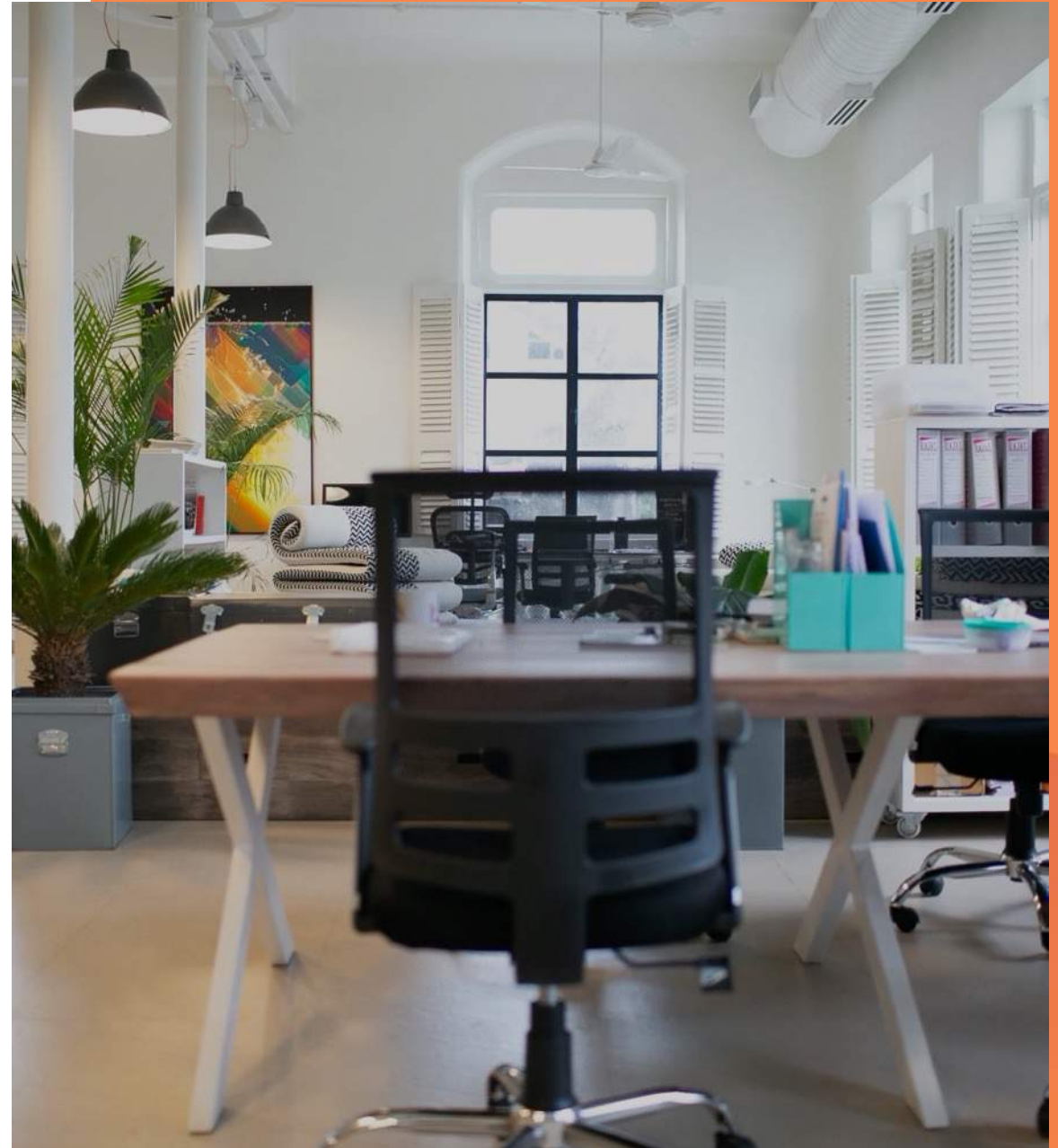


17

Average number of
benefits offered by
employers in 2021 –
a **9% increase** from 2020

EMPLOYERS ARE OFFERING MORE AND MORE BENEFITS

As The Great Resignation rages on, its important that employers remain competitive in the job market. In response, many are offering more benefits without increasing the cost for employees.



\$12,600

Amount employers and employees spent on benefits in 2021 - a **24% increase** in the last 5 years

BENEFIT COSTS ARE ALSO CONTINUING TO INCREASE

Another way employers are remaining competitive is by absorbing more of the benefit costs as they increase. Employers contributed 77% in 2021.

Additionally, the employer contribution to employee-only plans increased 12% and their contribution to family plans increased 8% since 2020.



DEPENDENT ELIGIBILITY VERIFICATION



**\$3,500 ANNUAL
SAVINGS PER
INELIGIBLE
DEPENDENT**



**70% TOTAL
MANUAL HR
ADMIN EFFORT
SAVED**



**6% OVERALL
DEPENDENTS
FOUND
INELIGIBLE**



**17X AVERAGE.
3-YEAR ROI ON
DEPENDENTIQ**

AUDIENCE FEEDBACK

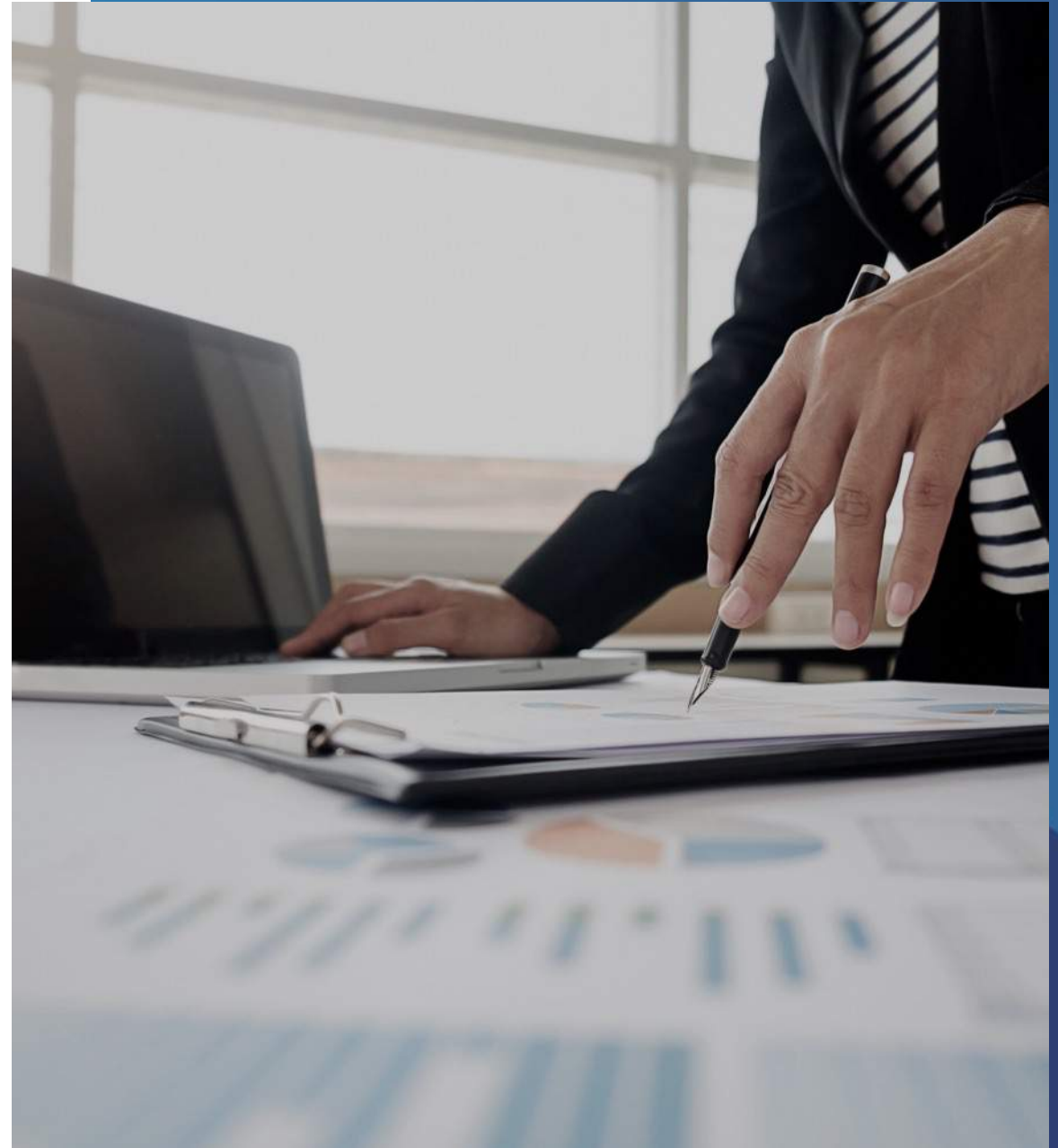
How are you currently
verifying that your
dependents are eligible?

POLL

Full Versus Ongoing Audits

FULL AUDIT

A full audit is when someone performs a comprehensive audit of your entire covered workforce. They must identify all enrolled dependents, print and/or send verification letters, request and verify documentation, and remove any ineligible dependents.



ONGOING AUDIT

When new dependents are added, you must verify eligibility as they come in. This includes manually reviewing any documents that could not be automatically verified by software tools and communicating any changes or additional documents with the employee.



WHY YOU NEED BOTH



ENSURE FUTURE
EFFICIENCY AND
ACCURACY



PREVENT
UNNECESSARY
COSTS NOW AND
IN THE FUTURE



CONTINUE TO
REDUCE RISK IN
THE FUTURE

AUDIENCE FEEDBACK

What hesitation(s) do you have about auditing your dependents?

POLL

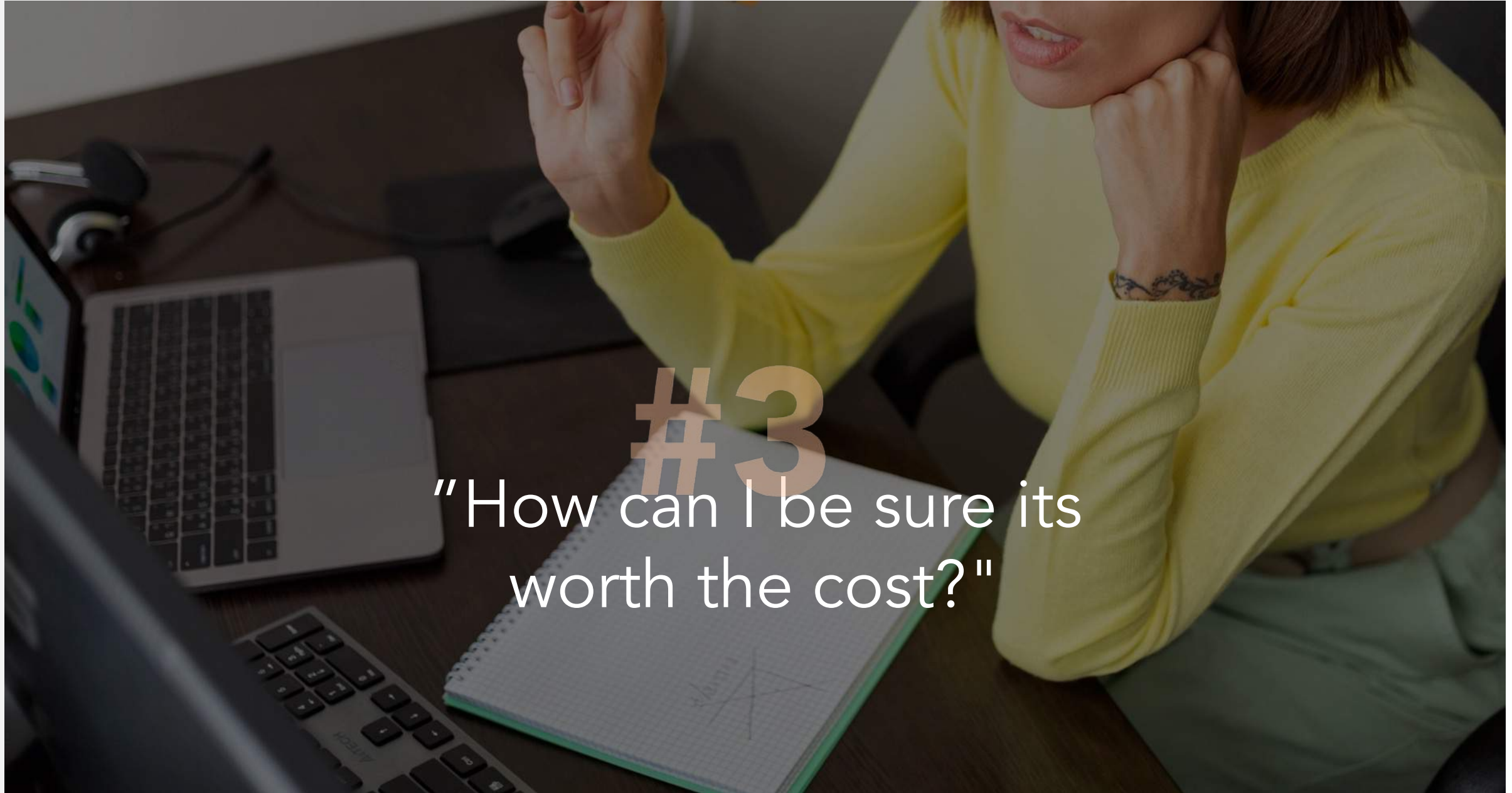


#1

"Its too complicated and time consuming for HR"

A close-up photograph of a person's hand using a black calculator on a wooden desk. In the background, there is a brown paper coffee cup with a black lid, some papers, and a pen. The scene is dimly lit, creating a professional and focused atmosphere.

#2
"It's too expensive"



#3

"How can I be sure its worth the cost?"



#4

"I trust my employees to ensure eligibility themselves"

DEPENDENTIQ

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.

Demo

TB Taylor Brown

Employee Status: Active Employee
Enrollment: Not Enrolled
Subscriber ID: 1400572
Actions

Basic Information		Employment	Contact Information	
First Name	Middle Name	Last Name	User Name	
Taylor		Brown	tbrown3333	
Employee Status	Gender	Birthdate	SSN	
Active Employee	Male	07/14/1984	XXX-XX-3333	
Coverage Start Date				
08/01/2018				

Tasks Actions

No Pending Tasks

Benefits & Family Actions

Benefits (0) Family (3)

Name	Relationship	Age	SSN	Gender	Dependent/Q Status
SB Sammy Brown	Spouse	36	XXX-XX-5555	Female	Not Started
WB Wayne Adams Brown	Child	5	XXX-XX-1111	Male	Not Started
EB Emerson Jane Brown	Child	0		Female	Not Started

Show Inactive

History Actions

Life Events
Dependent/Q
Document Requests
Evidence of Insurability
Work Status Events

- Profile >
- Benefits ! >
- Admin >

Welcome back Taylor, you have **230 days left to enroll**.

Continue Shopping for Benefits

Just click "continue enrollment" to pickup where you left off.

[Continue Enrollment](#)

Review Profile Shop Benefits Checkout

Need to update your current benefits?
Have you had a qualifying life event such as a new addition to your family?
[Update your current benefits.](#)

Current Benefit Elections

Enrollment Complete!

You have completed the open enrollment process and confirmed your benefits.

Need a copy of your benefits confirmation statement? [Send by Email](#)



The coverage details listed below are the current active elections on file for you and your dependents.

- If you believe there is an error in your statement, please contact your Benefits Administrator.
- If you need to make changes due to a qualify life event, please click on the Life Event link to the left.

Click on the icons below to print your confirmation statement or generate a pdf file.

Your To-Do List ⁴

0 of 4 Complete

<input type="checkbox"/>	Upload the required document for Sammy Brown by May 12 2022	Open	>
<input type="checkbox"/>	Upload the required document for Sammy Brown by May 12 2022	Open	>
<input type="checkbox"/>	Upload the required document for Wayne Brown by May 12 2022	Open	>
<input type="checkbox"/>	Upload the required document for Emerson Brown by May 12 2022	Open	>

New Enrollment Plan Year Effective from 01/01/2023 to 12/31/2023

[DOWNLOAD](#) [EMAIL](#) [PRINT](#)

Below are your new elections. Benefit elections may be changed during your company's Open Enrollment or if you've had a [Qualifying Life Event](#).

Medical

	Medical Plan 1	\$327.69 Per Pay Period	View or Change
Pending Approval			

Dental

	Dental Plan 1	\$18.46 Per Pay Period	View or Change
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Current Benefit

Enrollment Co

You have completed th

Need a copy of your be



Review Profile

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New Enrollment

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Medical

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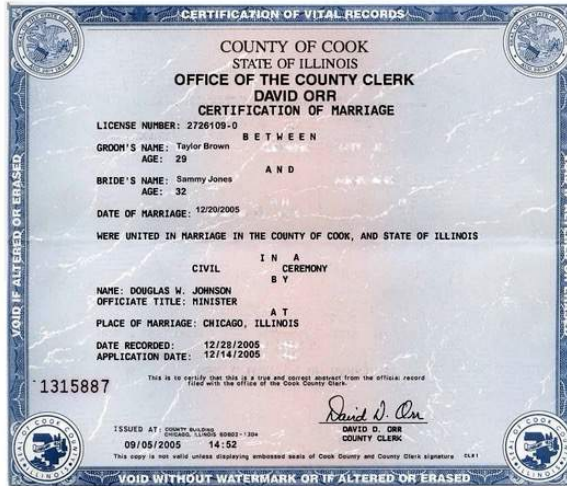
Pending App

Dental

MetLi

The document supplied did not meet the requirements for auto-approval. The document has been submitted for an administrator to manually review.

Document Preview



Status

AUTO-APPROVED

Document Type: Marriage Certificate
 Name: Sammy Brown
 Date: 04/12/2022

Close

Current Benefit

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New Enrollment

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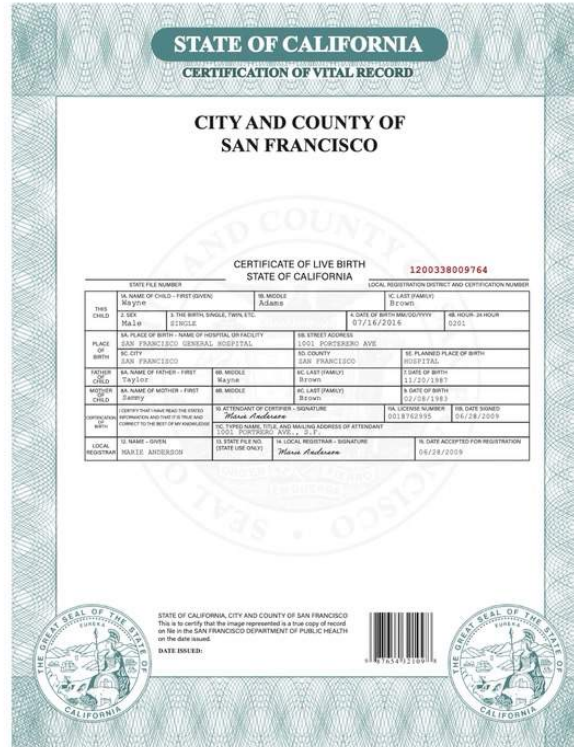
Pending App

Dental

MetLi

The document supplied did not meet the requirements for auto-approval. The document has been submitted for an administrator to manually review.

Document Preview



Status

AUTO-APPROVED

Document Type: Birth Certificate
 Name: Wayne Brown
 Date: 04/12/2022

Close

TB Taylor Brown Employee Status: Active Employee Enrollment: Not Enrolled Subscriber ID: 1400572 Actions

Basic Information		Employment	Contact Information	
First Name	Middle Name	Last Name	User Name	
Taylor		Brown	tbrown3333	
Employee Status	Gender	Birthdate	SSN	
Active Employee	Male	07/14/1984	XXX-XX-3333	
Coverage Start Date				
08/01/2018				

Tasks

Loading...

Loading...

Loading...

Taylor Brown

Employee Status
Enrollment
Subscriber ID

Active Employee
Not Enrolled
1400572

Actions ⋮

Basic Information
Employment
Contact Information

First Name	Middle Name	Last Name	User Name
Taylor		Brown	tbrown3333
Employee Status	Gender	Birthdate	SSN
Active Employee	Male	07/14/1984	XXX-XX-3333
Coverage Start Date			
08/01/2018			

Tasks
Actions ⋮

No Pending Tasks

Benefits & Family
Actions ⋮

Benefits (0)

Family (3)

New Hire Enrollment

Not available

Open Enrollment : Completed

Available 01/15/2022 to 11/28/2022

Life Events

[Create a new life event](#)

Plan Year	Employee Cost	Employer Cost
<input style="width: 90%; border: 1px solid #ccc;" type="text" value="01/01/2022 - 12/31/2022"/> ▼	\$0.00 /per pay period	\$0.00 /per pay period

Benefit	Plan Name	Coverage Level	Employee Cost

PLANSOURCE

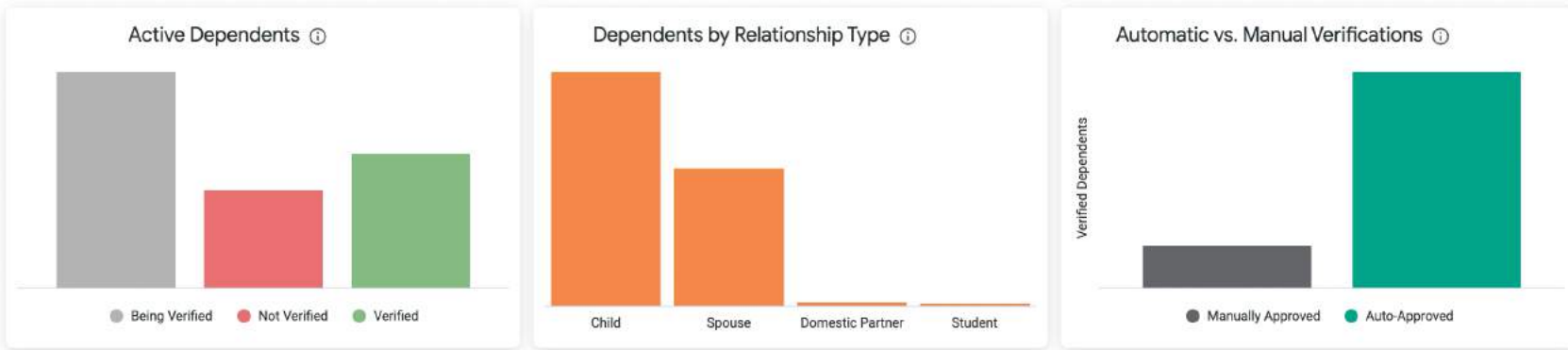
Highlights

This is a high-level overview to show the benefits and efficiency of DependentIQ in your organization.



Dependent Summary

This section reviews the breakdown of dependents in your organization's data, based on information found in the DependentIQ section in each Employee Profile.



PLANSOURCE IQ SUITE

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



Q & A

SHRM AND HRCI CODES

SHRM: 22-T4WH9

HRCI: 592923