



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

# Customer Winter Release Preview

## TODAY'S SPEAKERS



**JOHN WILSON**  
VP, Product Management



**ERIKA MUNK**  
Product Manager



**IDAMARIE DOVER**  
Product Operations Manager



**MADISON GRASTY**  
Sr. Manager, Product Management

# AGENDA

2022 in Review

The Source

Ecosystem Integrations

ACA

Customer Experience Enhancements

2023 Roadmap Preview

Resources



# 2022 ACCOMPLISHMENTS

Focuses on reducing friction, performance and customer commitments

- **Email-less username and password reset**

- Premium Billing UI update
- Updated payroll schedules
- API Observability improvements
- ACA updates for smoking costs
- Performance improvements across the platform
- **Capacity planning for '22 OE**
- Dozens of new benefit types
- Email campaign enhancements
- InsightsIQ dashboard refresh

- **Guided Renewal v2**

- Templated Boost Content
- Mobile SSO enhancements
- Improvements to HSA algorithms
- Multi-document DependentIQ
- DecisionIQ and Dependent IQ ROI Dashboards
- Additional voluntary products added to DecisionIQ
- **Refreshed Spanish Translation**
- EDI management enhancements

# WINTER RELEASE THEMES



Enhancing  
communications and  
engagement



Reducing friction for all  
user types



Expanding the benefits  
ecosystem

Building a frictionless benefits experience, relevant 24/7/365

# The Source

## THE CHALLENGE

**15 MIN**

EMPLOYEES  
SPEND CHOOSING  
BENEFITS

**\$10,000**

EMPLOYERS  
SPEND PER  
EMPLOYEE

**80%**

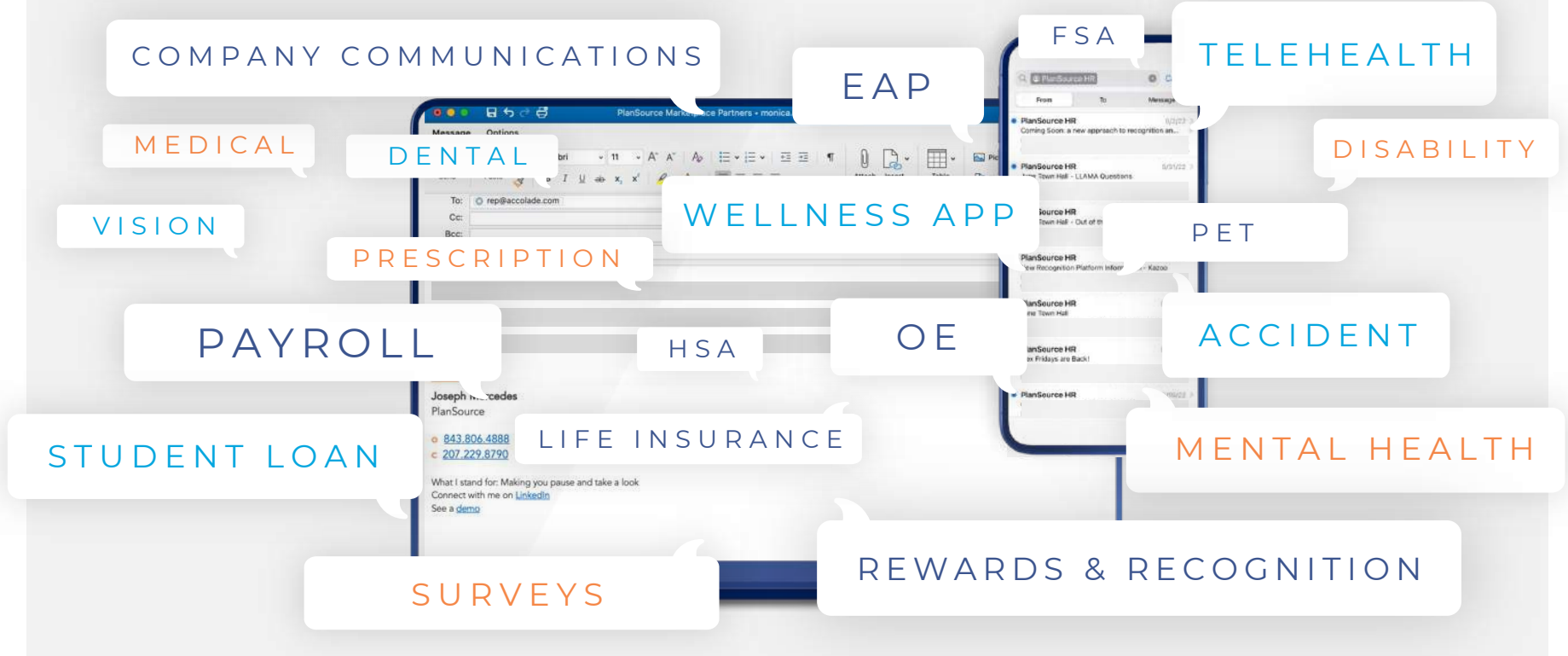
COMPANIES SAY  
EMPLOYEES DON'T  
READ COMPANY  
COMMUNICATIONS

**85%**

ADULTS  
HAVE A  
SMARTPHONE

# Employees Are Bombarded with Benefits & Initiatives

For the benefit of the employees, HR is constantly launching company initiatives





# Multiple Systems to Access Health Benefits + Point Solutions + Company Info



## SELECTIONS MADE BY CUSTOMERS GET LOST IN THE FLOW OF DAILY LIFE

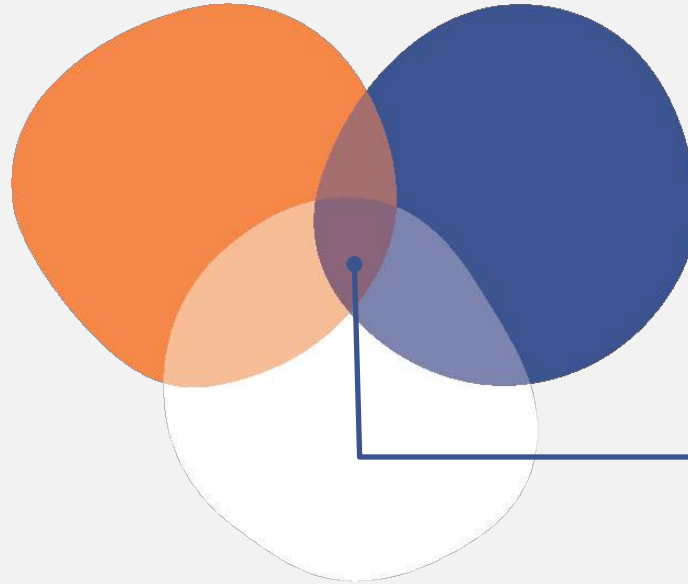
- A. Apps are spread across mobile phones via individual apps
- B. Employees come into our platform annually
- C. Not all employees have a work email so customers cannot reach everyone
- D. Many plans and benefit options are across intranets or other portals

# The Source

Creating interoperability for the HR professional

HCM  
PROVIDERS

BEN ADMIN



**THE SOURCE**

ENGAGEMENT TOOLS

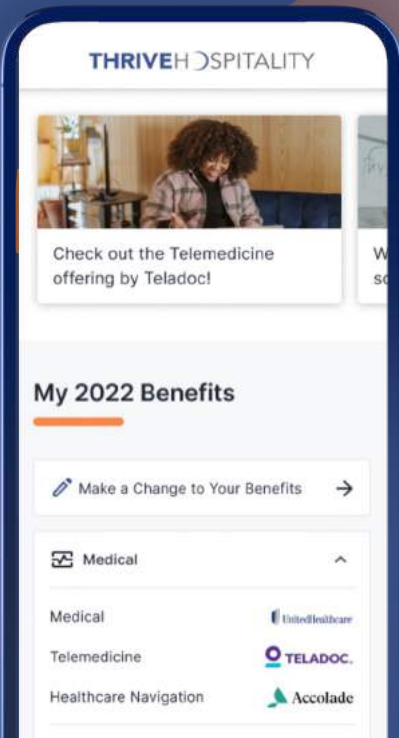
Password

.....

Log In

[Forgot your password?](#)

[Privacy Policy](#)



## THE SOURCE

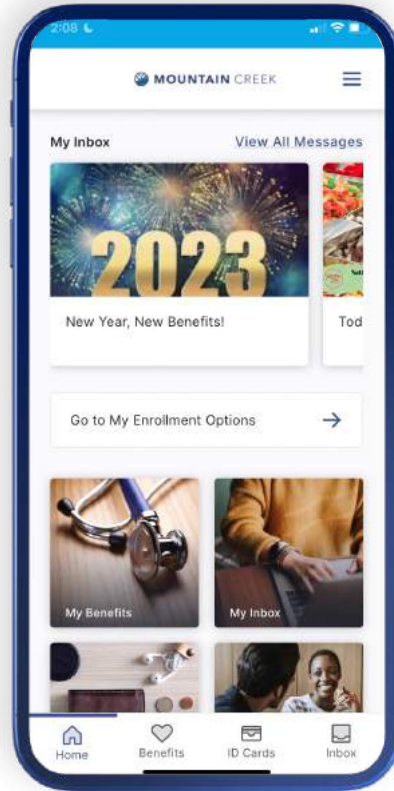
Making company news,  
initiatives and benefits  
relevant 24/7/365

GENERALLY AVAILABLE

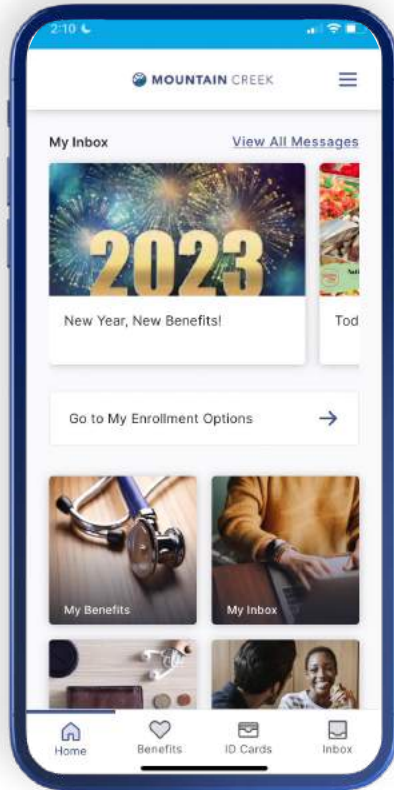
# Employer Branding



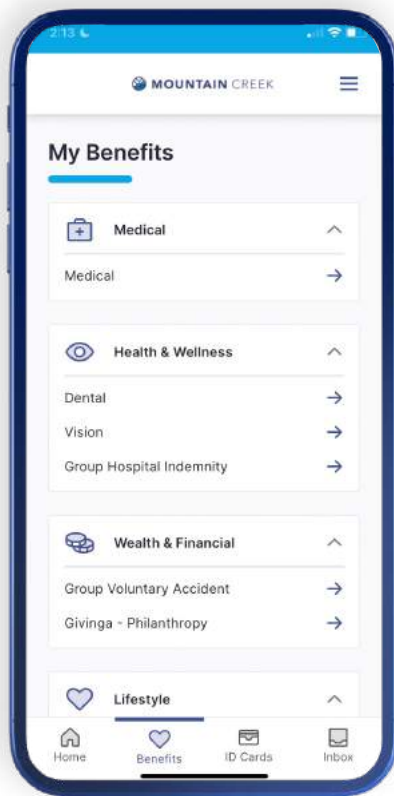
# In-App Communications



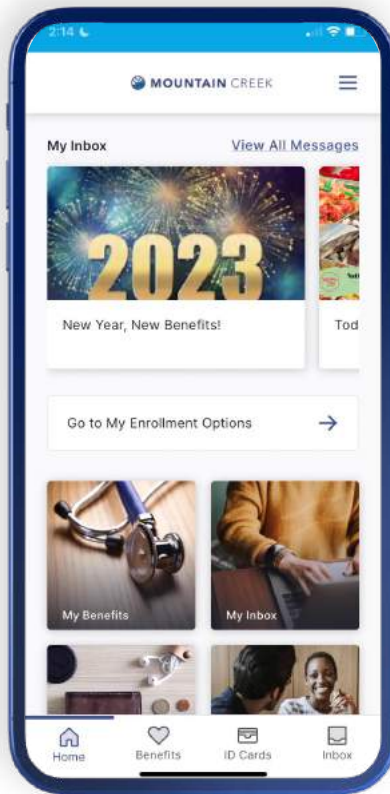
# Benefits Enrollment



# My Paycheck & My Company



# Quick Links

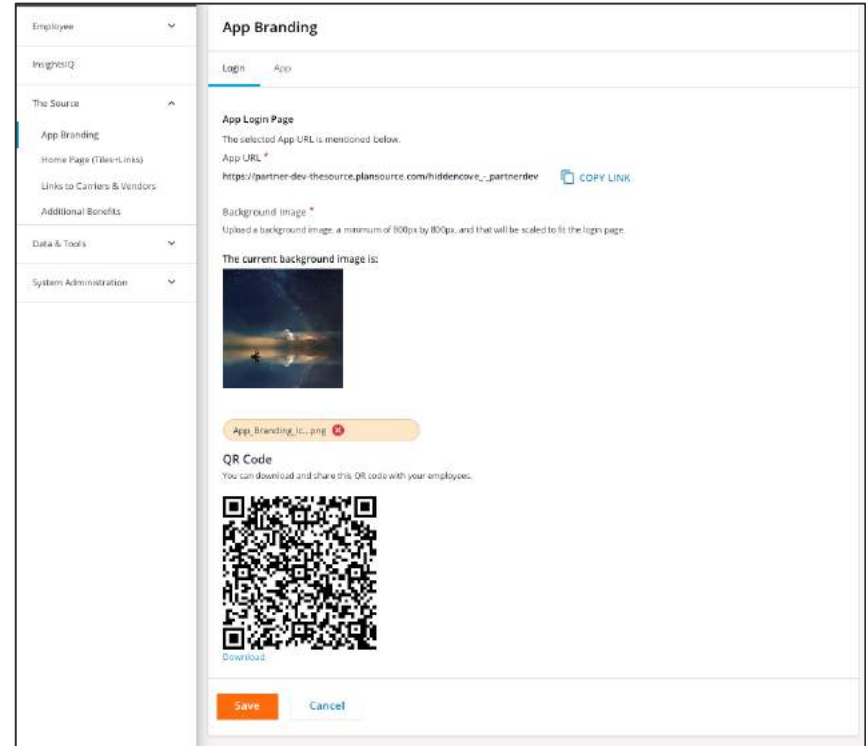




## QR Code in App Branding

- Static QR Code available for download
- HR Admins can use this to distribute The Source URL for employee use (via email, paper copy, etc.)

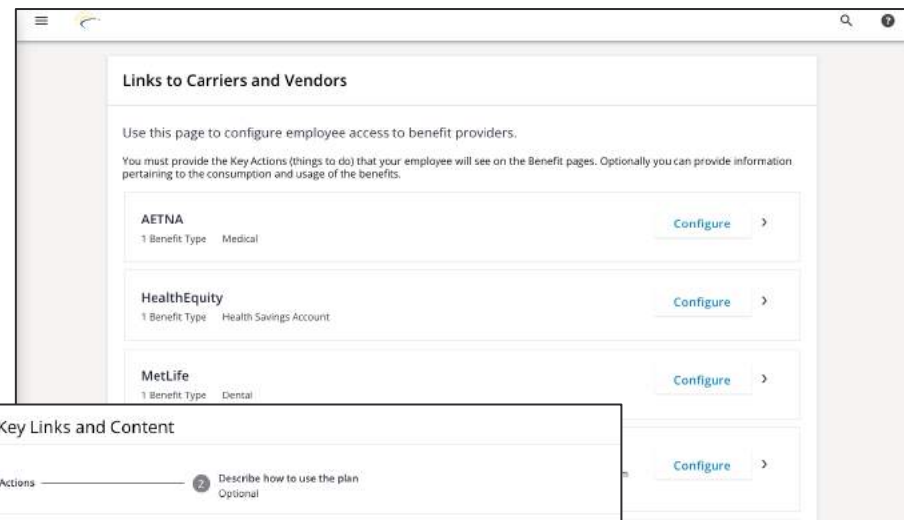
COMING SOON WITH THE  
WINTER RELEASE!



## Key Actions on Benefit Pages

- 4 Key Action links available to be added and customized on every benefit page
- Examples:
  - Log in to my benefits portal
  - Talk to a Doctor
  - Visit my Provider

COMING SOON WITH THE  
WINTER RELEASE!

A screenshot of a modal dialog titled "Configure Key Links and Content". It has a progress bar with two steps: "1 Define Key Actions" (active) and "2 Describe how to use the plan Optional". The main section is titled "Add Key Actions (carrier links) that will allow employees to engage with the carrier portal for information unique to their chosen plan." Below this, it says "You can configure up to 4 key actions." There are two entries, each with a checkbox and a plus icon. The first entry is "Log in to my benefits portal", with a text field for "Name your key action \*" containing "Log in to my benefits portal" (30 / 30 Characters Remaining) and a text field for "Link/URL" containing "https://www.aetna.com" (30 / 30 Characters Remaining). The second entry is "Talk to a Doctor", with a text field for "Name your key action \*" containing "Talk to a Doctor" (30 / 30 Characters Remaining). At the bottom are "Continue" and "Cancel" buttons.

## Informational Benefits in The Source

- Ability to add and configure additional benefits for employees without confining them to a plan year
- You can also supplement these with key actions and extra benefit details!

COMING SOON WITH THE  
WINTER RELEASE!

×

### Add New Benefit

Here is what you can add.

You can now add Informational Only Benefits that don't require complicated configuration or multiple plans. These benefits aren't tied to a set plan year and can be added at any point throughout the year.

Effective Start Date\*

MM/DD/YYYY

To

Effective End Date

MM/DD/YYYY

Benefit Type\*

Choose Benefit Type

Benefit Title (0/30) \*

Enter Benefit Title

Additional Benefits	
You can add and configure additional benefits to your employees in this space without confining them to a plan year.	
List of Benefits	<a href="#">Add New Benefit</a>
<div><div>Work Tango</div><div>Effective from 2023-01-09 to 2024-01-09</div><div>Lifestyle</div><div><a href="#">View Details</a></div></div>	
Rows per page: 10 1-1 of 1	

# Ecosystem Integrations

Madison Grasty

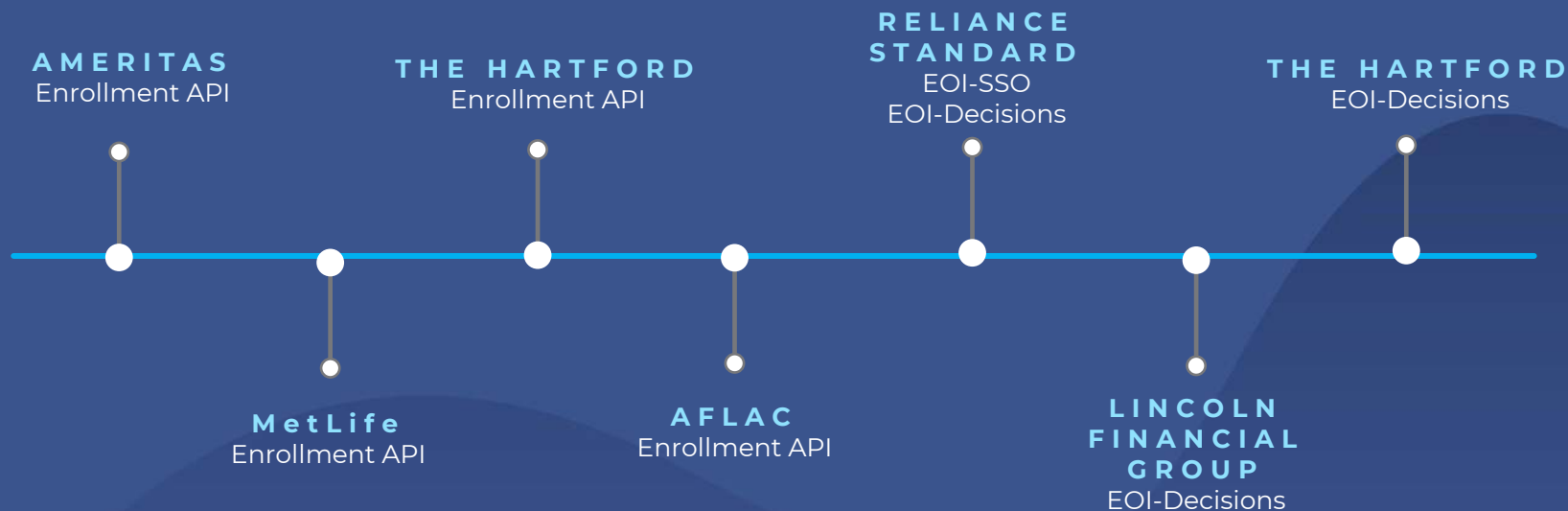
# New Integrations

360-API Integrations and Employee SSO



# 2023 Upcoming Integrations

Early Adopter Programs begin in the first half of 2023



# Access Management for Broker Administrators

## Auto-Assign New Organizations

- Capability reveals a new checkbox on broker administrators profile allowing them to be automatically assigned to newly created organizations instead of having to assign new organizations each time one is created.

## Administrator Expiration Dates

- Capability provides the ability for an administrator to assign a user access to an organization for a specific period (i.e., expiration date)

The screenshot displays the 'Manage Administrators' interface. The left sidebar contains a navigation menu with options like Home, Client Administration, Reports, Tickets, and System Management. The main content area is titled 'Manage Administrators' and is divided into two primary sections: 'Administrator Information' and 'Available Organizations'.

**Administrator Information:** This section contains various fields for user details. The 'Username (for login)' field is set to 'sp\_broker\_admin2'. The 'Type of Admin' is set to 'Administrator'. Other fields include 'First Name' (sp), 'Middle Name', 'Last Name' (admin), 'Phone Number', 'Cell Phone Number', 'Fax', 'Email' (test@test.com), and 'Time Zone' (Eastern (US & Canada)). There are also checkboxes for 'Is Agent', 'Is Primary Administrator' (checked), 'Is Data Discrepancy Contact', 'Receive System Downtime Notifications', 'Receive System Release Notes' (checked), 'Receive Renewal Notifications' (checked), 'Receive Ticket Notifications' (checked), and a newly added checkbox 'Auto Assign New Organizations' (checked).

**Available Organizations:** This section lists organizations that can be assigned to the administrator. The 'KALYANTEST' organization is selected with a checkbox. Below it, the 'snaha\_client\_1' organization is selected with a checkbox, and its expiration date is set to '01/04/2023'. The 'sp\_blank\_client' organization is also selected with a checkbox. For each organization, there are radio buttons for 'Full Access' and 'Temporary Access'.

**Available Roles:** A list of roles is shown on the right, with 'System Administrator' selected by default. Other roles include CRM Administrator, Read-only Administrator, Organization Administrator, Organization Super User, Export Administrator, Super User Ultimate Power, Carrier Administrator, Master Org Admin w/ Bill Adjust, Root Master Administrator, Ge Administrator, Benu Broker Super User, Benu Broker Analyst, Benu Employer Admin, PAHRA Administrator, Master Broker Administrator, Broker Administrator, Producer, Broker Premium Billing Administrator, Employer Master Administrator, Employer Administrator, Employer Premium Billing Administrator, Carrier Billing Only, CoAdvantage Employer Administrator, CoAdvantage PAHR Employer Admin, CoAdvantage PAHR Broker Admin, Benu Premium Billing Only, General Administrator + Exports, PS Account Manager, and Benu Broker Admin (Only New Employees).

# ACA Filings and Customer Experience Enhancements

Erika Munk



# ACA 2022 Highlights



## Email Notification

Email notification will be sent to PlanSource ACA Fulfillment team when an employer has enabled ACA reporting and forms have already been mailed



## Annual Updates

Annual regulatory updates were completed in the system and for 2022 to both the forms and transmission engines for 2022 filing



## Optimization Improvements

Enhancements were made to the ACA module to increase performance and ease of reporting

# Contact Us

- Available on Employer Admin Dashboard
- Clients assigned to the PlanSource Core team will see the tile
- Core Team phone number & email address are displayed

The screenshot displays the PlanSource Employer Admin Dashboard. The 'Contact Support' tile is highlighted with a red border. The dashboard includes sections for 'Manage Employees', 'Your Tasks', 'Benefits Enrollment', 'Learning & Development', and 'Links'.

### Manage Employees

Find an employee

[Add a New Employee](#)

Recently Viewed Employees

### Your Tasks

0 Life Events

1 Document Requests

36 Evidence of Insurability (EOI)

37 Pending Tasks

[View Pending Tasks](#)

### Benefits Enrollment

Open Enrollment | New Hire Enrollment

Plan Year: 2022-01-01 to 2022-12-31

0 Days Left to Enroll

Open Enrollment: 11/14/21 - 11/22/21

155 Enrolled

21 Not Enrolled

4 Not Started

17 Incomplete

### Reports

[View Open Enrollment Reports](#)

### Communications

[Send an Enrollment Message](#)

[Send Abandoned Cart Message](#)

[Send Batch Confirmation](#)

### Learning & Development

**GuideMe**  
Feature tours and product knowledge base

**PlanSource University**  
Join your peers in learning with PlanSource University!

### Contact Support

Phone: (866) 205-9445

Email: [TeamDash@plansource.com](mailto:TeamDash@plansource.com)

### Links

# Document Deletion

Administrators can delete documents at the Admin & Employee levels

The screenshot displays the Munk's Demo Client interface. On the left is a sidebar menu with options: Employee, Dashboard, Find an Employee, Tasks (with a red notification dot), New Hire Processing, InsightsIQ (with a blue badge), Data & Tools, and System Administration. The main content area features two red notification banners at the top, each with a 'CONFIGURE' link. Below these is a profile card for 'Amos TEST48848' with fields for Employee Status (Active Employee), Enrollment (Enrolled), and Subscriber ID (2958490). Under the profile card is a table with tabs for Basic Information, Employment, and Contact Information. The Basic Information tab is active, showing fields for First Name (Amos), Middle Name, Last Name (TEST48848), User Name (atest0910), Employee Status (Active Employee), Termination Date, Gender (Male), Birthdate (08/04/1960), SSN (XXX-XX-0910), and Coverage Start Date (01/01/2021). At the bottom is a 'Tasks' section showing 'No Pending Tasks'.

EM Erika Munk Master Admin

Munk's Demo Client

It's time to configure your Guardian EOI integration to boost functionality and enhance your employees' enrollment experience. [CONFIGURE](#)

It's time to configure your Guardian Boost integration to boost functionality and enhance your employees' enrollment experience. [CONFIGURE](#)

AT Amos TEST48848 Employee Status: Active Employee Enrollment: Enrolled Subscriber ID: 2958490 Actions

Basic Information		Employment		Contact Information	
First Name	Middle Name	Last Name	User Name		
Amos		TEST48848	atest0910		
Employee Status	Termination Date	Gender	Birthdate		
Active Employee		Male	08/04/1960		
SSN	Coverage Start Date				
XXX-XX-0910	01/01/2021				

Tasks Actions

No Pending Tasks

# HSA Calculation Toggle

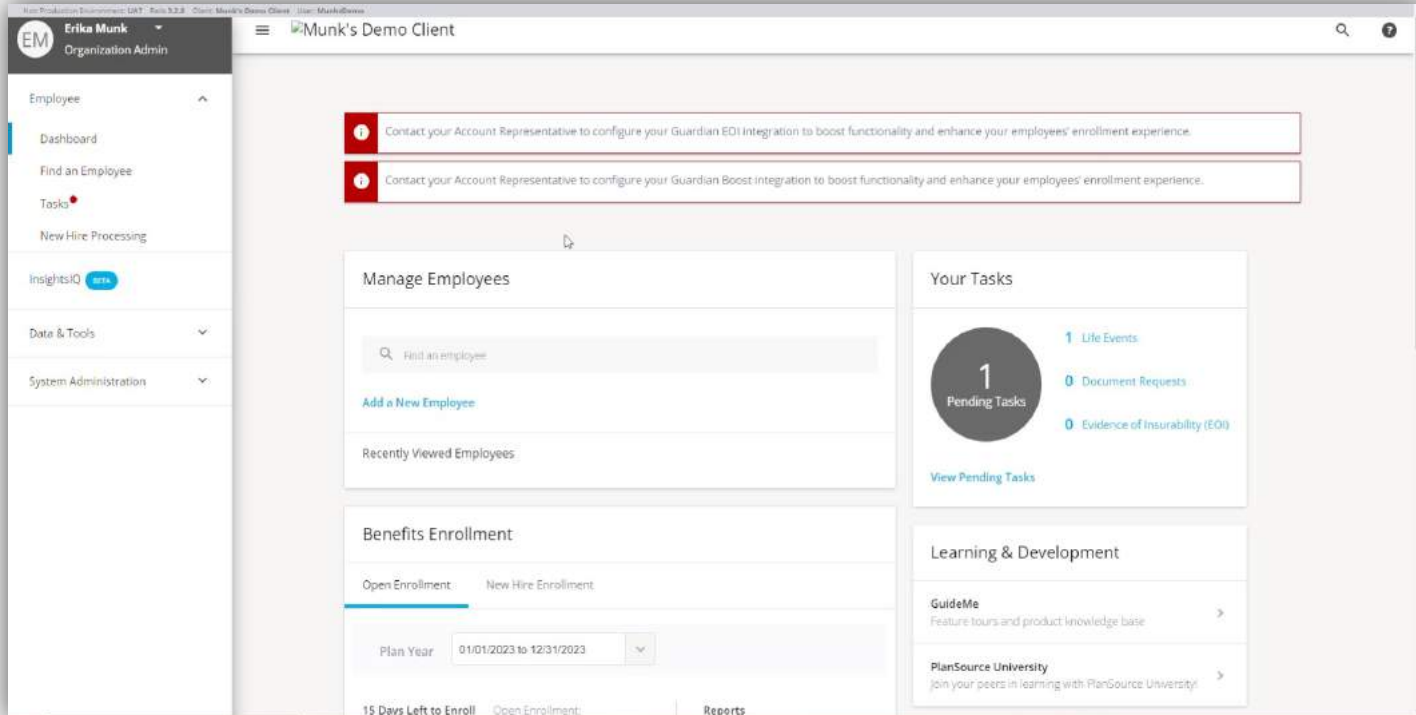
- **Problem:** Under certain circumstances, incorrect calculations and rounding errors occurred with *HSA and FSA* deductions.
- **Solution:**
  - Simplified the HSA/FSA deduction calculation to make it more accurate and consistent in all scenarios
  - Introduced a new audit system to track changes that occur throughout the year
  - Addressed known HSA and FSA calculation bugs

***Toggle Enabled on December 27, 2022***

The screenshot displays the 'Health Savings Account: HSA Accounts' interface. It features a 'Select Coverage Amount' section with a 'Contribution Timeline' dropdown set to 'Per Year'. Below this, there are radio buttons for 'Annual' (selected) and 'Per Pay Period'. A blue box indicates the 'Maximum Contribution Limits' with 'Annual: \$0.00' and 'Per Pay Period: \$3.70'. The 'Annual Personal Contribution' is set to '\$ 100.00', with a 'Maximize My Contribution' link. A note specifies 'Minimum \$100.00 | Maximum \$100.00'. The 'Total Annual Contribution' is also '\$ 100.00', with a sub-note 'Includes Personal and Employer contributions'. A disclaimer states: 'Please note: Your election amount has changed due to calculation and rounding based on the amount you elected.' At the bottom, it shows 'Personal Contribution: \$100.00' and a calculation: '\$100.00 Annual Contribution = \$3.70 Per Pay Period Contribution'. On the right, a summary box shows 'HSA Accounts' with a value of '\$3.70 Per Pay Period' and buttons for 'Update Cart' and 'Decline Coverage'.

# Read-Only Configuration Access

Grants access to all information in configuration in read-only mode, including Configuration Report



# Customer Experience Highlights



## SPANISH TRANSLATION

Refreshed Spanish translation for employee experience & removed the Espanol PR as an option



## SSO UPDATES

Removed access to Legacy & OAuth 2 options and moved from Username to SSO ID for Administrator verification



## GENDER U/X

Gender U and X support now available in:

- Reports – Employee Census Report
- Batch Demographic Import
- Data Imports
- EOI Data Payloads



## CONFIG UPDATES

**Plan level** options have been moved from under the advanced tab to the main plan page

**Benefit level** options have also moved so they display next to each other

# Q&A

# 2023 RELEASE SCHEDULE

## Continuous Investment and Innovation

WINTER  
January

SPRING  
April

SUMMER  
August

Major releases three times per year with a published release schedule. Learn more at [releases.plansource.com](https://releases.plansource.com)

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