

MAXIMIZE THE BENEFITS OF YOUR BENEFITS

PlanSource has transcended into a benefits engagement platform built upon superior benefits administration technology. We automate and streamline every aspect of employee benefits programs, so HR teams can spend less time on ben admin tasks and more time where it really matters. With PlanSource, you get employee engagement, communications management, decision support and a partner that grows with you, supporting your needs as you focus on recruitment and retention of top talent. A better benefits solution has never been more attainable.

POWERFULLY SIMPLE BENEFITS ENGAGEMENT AND MANAGEMENT

Enrollment · Communications Management · Employee Engagement · Administration · Billing · Compliance

AI POWERED SOLUTIONS



DependentIQ

Instant, AI-powered eligibility verification



DecisionIQ

Prescriptive, AI-based decision engine



InsightsIQ

Powerful benefit reporting at your fingertips

THE SOURCE



Innovative platform designed to make company news, initiatives and benefits relevant 24/7/365



Features single sign-on, enrollment and find a provider all in the palm of your hand

END-TO-END BENEFITS SERVICES

Benefits Software

Employee Engagement

Communications

Shopping

Enrollment

Billing

Compliance

Administration

MODERNIZE YOUR BENEFITS EXPERIENCE WITH PLANSOURCE BOOST

PlanSource is a first mover with multiple insurance carriers on API integrations

A groundbreaking experience that provides organizations with industry-leading benefits technology and carrier API integrations that modernize the benefits experience for employees and HR teams

Preferred pricing*

when customers offer one or more Boost products

Employee shopping

experience optimized to drive engagement

Modern API

integrations that provide a real-time customer experience

Simplified self-billing*

that eliminates the need to reconcile carrier bills

What Employers Say

PlanSource has proven that they really are experts in benefits, customer service and software. They easily save us one week per month in real time that we can now put towards more strategic initiatives.

– Courtney Scardino, Regional HR Business Partner, Strategic Materials

What Partners Say

PlanSource gave us the best technology with the most tools and innovative features that we need for our clients today and tomorrow.

– Justin Peter, VP of Marketing, 4myBenefits

Simplifying Benefits Engagement for Employers of All Types



About PlanSource

Founded in 2008

800+ Team Members
175 dedicated to customer success

500+ Brokers

95% Service Score during OE

*Not available for reseller partners

PLANSOURCE.COM | CONTACT@PLANSOURCE.COM | 877.735.0468



A VISTA PORTFOLIO COMPANY