PlanSource and Paylocity
Building better benefits experiences together

Paylocity

Paylocity offers an intuitive, easy-to-use product suite that helps businesses automate and streamline HR and payroll processes, attract and retain talent, and build culture and connection with their employees. Known for our unique culture and consistently recognized as one of the best places to work, we accompany our clients on the journey to create great workplaces and help all employees achieve their best.

PlanSource

The PlanSource platform provides the best experience possible for benefits communications, shopping, enrollment, billing, compliance and ongoing administration. We partner with leading brokers, carriers and tech providers to provide companies of all sizes with a complete solution for benefits administration.

Together

Leverage the power of PlanSource benefits engagement directly within the Paylocity system. Employees can add and update their information in real-time, and payroll deductions are reflected in Paylocity within that current pay cycle. New hire information, terminations and any general employee changes are shared seamlessly between Paylocity and PlanSource, saving HR time and improving the employee benefits experience.

Why PlanSource and Paylocity?

» **Simplified implementation** – A simplified process built to drive an efficient, quick and accurate implementation

» **Single Sign-On** – Employees can easily access their benefits within the Paylocity user experience

» **Seamless integration** – Securely transfer accurate, real-time data between systems

» **Real-time changes** – Employees can easily make a change to their benefits right from Paylocity's platform and it will be reflected in payroll deductions within the current pay cycle

» **Preferred pricing** – Paylocity data integration fees are waived for new customers to PlanSource and Paylocity

» **Strong partnership** – A partnership backed by two trusted, industry-leading providers

PlanSource Offers the Best Experience For

- Benefits Shopping
- Enrollment
- Billing
- Compliance
- Administration

A Mobile-Friendly Employee Experience

Self-Service Access

Educational Videos and Content

Personalized Recommendations

People-Friendly Experience

Mobile Shopping and Checkout

Sophisticated Benefits Administration and Automation

Eligibility Management

Employee Communication Tools

Cost Calculations

Flexible Reporting

Ecosystem Integration

PlanSource Boost

A groundbreaking program 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