PlanSource Boost Evidence of Insurability SSO + Decision Notification API

Building better benefits experiences through innovative technology and partnerships

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. The evidence of insurability (EOI) single sign-on (SSO) and decision notification application programing interface (API) integration are two of the available Boost integrations through the PlanSource Boost program.

Evidence of Insurability SSO and Decision Notification API Integration

The EOI SSO will save you valuable time and effort of managing manual EOI forms and paperwork. On average, customers can save 15 – 30 minutes per EOI request which can really add up during open enrollment! PlanSource has established an integration with the insurance carriers noted below which allows employees to use single sign-on (SSO) to fill out and submit the carrier EOI form. Employees can access and answer EOI questions *at checkout in the benefits shopping experience*, and the participating Boost insurance carrier will automatically receive it.

Plus, with the decision notification API, the carrier's decision status gets updated in the PlanSource platform in real-time, and automatically alerts HR Admins and employees to keep them in the loop.

The Benefits of Our Integration

AUTOMATED FOR HR TEAMS

EOI decisions from the carrier are automatically sent back to PlanSource and HR and employees are notified in real time.

AUTOMATIC SUBMISSION

EOI decisions and data sync over to PlanSource in real time, including approval status, coverage amounts and start dates.

FULL VISIBILITY

Monitor and audit all of your automated EOI processing with easy-to-use administrator task checklists, reports and dashboards.

When is EOI Required?

This can vary by each benefit plan. In general, EOI is required for new elections over the guaranteed issue amount, for changes to existing benefits greater than a certain amount, or both.

THROUGH THE EOI SSO AND DECISION NOTIFICATION API:

» Turns a paper-heavy process into an automated, single workflow.

» Employees can access, complete and submit EOI questions right from the benefits shopping experience on their computer or mobile device.

» Immediate response to coverage request.

» Employees can clearly see the coverage amount and paycheck deduction that is approved, and the additional coverage amount and paycheck deduction that is pending approval.

» HR teams can save 15 – 30 minutes per EOI request which is especially valuable during OE!

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