PlanSource Boost
Evidence of Insurability SSO
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) integration is one of the available Boost integrations through the PlanSource Boost program.

Evidence of Insurability SSO Integration

The EOI SSO will save you valuable time and effort 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.

The Benefits of Our Integration

STREAMLINED COMPLETION
Single Sign-on to carrier forms lets employees complete EOI questions online within the shopping experience

AUTOMATIC SUBMISSION
EOI forms automatically send to the carrier, so you can say goodbye to printing and chasing down paper forms

REDUCED WAIT TIME
Our EOI integration provides faster turnaround time (sometimes immediately) so employees have coverage sooner.

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:

» When the system detects that an EOI is required, employees are notified within the shopping process.

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

» 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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*PlanSource internal data. Average value add based on case studies complete during early adopter programs.