

PLANSOURCE®

EXECUTIVE SUMMARY PREPARED FOR

White Cap

EPIC Insurance

APRIL 26, 2024

EXPIRES IN 30 DAYS

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April 26th, 2024

Dear White Cap RFP Evaluation Team,

Thank you for including PlanSource in this important evaluation of benefits administration providers for White Cap. Our team is excited about this opportunity, and we strongly believe that we offer unique value within today's benefits administration market. It is critical to us that our proposed solution is based on your goals and objectives, both now and as you grow in the future.

As you review our RFP response you will find significant detail regarding our proposed technology solution, service delivery model, security controls and pricing. The unique value that PlanSource offers White Cap is based on vast organizational expertise with customers just like you, industry leading integrations within the healthcare ecosystem and our unmatched innovation to deliver a more personalized employee benefits experience.

One of the unique offerings that PlanSource includes as part of our core solutions is a mobile engagement platform called **The Source** that will serve as a one-stop-shop for employees when it comes to benefits and work. The Source enables your employees to enroll in the right benefits from any device and know where to easily find them year-round. It also drives utilization of benefits by allowing employees to find a provider, consolidate and access their ID cards, and better understand their coverage details without having to login to multiple locations.

✓ **Guaranteed** solution delivery, backed by up to **15% fees at risk**



✓ **\$0.00** HSA admin fee



✓ **Credit of \$25.00 per account** up to **\$76,575** to any HSA account holder who is part of a bulk transfer.



In addition to the formal pricing inside our proposal you will find the following information:

→ Industry leading AI/ML technology providing ROI with tools that identify cost savings, enable better employee decisions and participation, and maximize HR efficiency

2 hours saved per New Hire with DecisionIQ educational content

11% increase in HDHP participation with DecisionIQ best match tech

70% time saved on dependent verification with DependentIQ

10% saved on healthcare costs with DependentIQ verification solution

→ Our investment in system connectivity provides a real-time customer experience that modernizes the benefits administration platform and saves valuable time for HR teams.

30 minutes saved per EOI decision request with EOI automation

50 minutes saved per plan with plan configuration API

20+ hours saved monthly for HR teams with Boost Billing Services

→ **White Cap** customized Customer Success experience allowing you to work in conjunction with the PlanSource team on your day-to-day tasks giving you flexible service options and industry leading products to make sure you're getting the most out of PlanSource every step of the way

40% time saved during annual renewal with the Guided Renewal Tool

25% HR manual effort reduced using automated workflows for daily tasks

53+ Net Promoter Score as of May 2023!

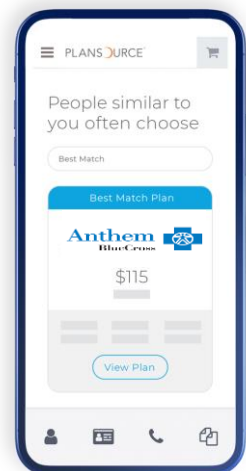
Sincerely,



Dave Firestone
Chief Revenue Officer

PlanSource Benefits Administration, Inc.

101 South Garland Ave
Orlando, FL 32801
(877) 999-1800





Complete Benefits Outsourcing


PlanSource Benefits Services can provide value to White Cap HR teams through the power of our tenured, consultative account management teams and range of technology-enabled benefit services that ensures that you get the most out of your benefits investment.

PlanSource will act as an extension of your benefits team, managing all aspects of delivery- from processing new associates and approving life events to managing EOI requests and data exchange with carriers. Our model also includes the below and more!

FREE UP YOUR HR TEAM TO FOCUS ON THE BIGGER PICTURE



 Included in Quote

 Included for additional fee

Learn more about Benefits Outsourcing at plansource.com/benefitsoutsourcing.

Our Customer Success Philosophy

THE RECIPE FOR WILDLY SUCCESSFUL CUSTOMERS

- **Problem solving** – We are a highly-skilled team of problem solvers who will work tirelessly to foster creative solutions
- **Governance** – The system is built strategically, with processes in place to ensure your success. Projects are managed, tracked, and reviewed by leadership
- **Client feedback** – Your feedback is important to us and it plays a major factor as we refine the PlanSource strategy
- **Empathy** – We don't hesitate to put ourselves in your place, understand where you're coming from and react accordingly
- **Curiosity** – Our team is chock full of curiosity – always digging deeper, looking for ways to improve, and find out more

YOUR SOLUTION

A comprehensive, configurable and automated platform back by an industry-leading client services organization

