One Source. Many Benefits.

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PLANSOURCE

APRIL 26, 2024

Agenda

Welcome & Introductions

The PlanSource Difference

System Demonstration
- HR Administrator Experience
- Employee Tools and Experience

Implementation & Customer Success

Open Discussion/Closing Comments

Yahoo!'s PlanSource Team

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Customer Success Leader for Yahoo!

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Here’s what we understand about you...

- **Make it Simpler.** A customizable, flexible and dependable platform to simplify administrative processes, and outstanding administrative tasks. Your employees are not as engaged as you'd like, and your administrators spend too much time on manual work.
- **Engage your employees.** Your people are your most valuable asset, and you want to help them get the most of out work and life by choosing the right plans.
- **Ensure data integrity and efficiency** with APIs and data integrations that keep all systems in sync especially with **Workday**
- Collaborate with a **proactive, experienced client services team** that will hold themselves accountable and help drive successful outcomes for Yahoo!

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PLANSOURCE

- Innovation
- Cultural alignment
- Accessibility
- Excellence

PLANSOURCE®

Free Up Your HR Team to Focus on the Bigger Picture

PlanSource Benefits Services provide value to HR teams that are consistently being asked to do more with less

- Yahoo!'s Anticipated Services
- Optional Services

- BENEFITS OUTSOURCING
- AI/ML DECISION SUPPORT
- DEPENDENT VERIFICATION
- REPORTING & ANALYTICS
- THE SOURCE – EMPLOYEE ENGAGEMENT PORTAL
- ACA ADMINISTRATION
- EMPLOYEE COMMUNICATIONS
- WORKDAY INTEGRATION
- PAYROLL DEDUCTION RECONCILIATION
- COBRA ADMINISTRATION
- SPENDING ACCOUNT ADMINISTRATION
- DIRECT BILL ADMINISTRATION
- QMCSO FORM COMPLETION
- EMPLOYEE CALL CENTER

DATA FLOW with HRIS/Payroll (Workday)

Yahoo! Service Center
800-xxx-xxxx Phone & Hours of Operation

Your PlanSource Team
Access for Administration

Yahoo! Employees
Direct Access URL or mobile (via biometrics) for Self Service

'The Source' Your Yahoo! Benefits Portal
PLANSOURCE

- SSO Integration with Workday & The Source
- HRIS Integration with demographic data (EDI file) triggers new hires, terminations, changes, etc

- HRIS Demographic Error Report & Data Validation Reports
- Payroll Deductions (EDI file)
- Reporting for HR Team

HRIS/Payroll Platform (Workday)
Employee Census Data Ownership

Yahoo! Intranet (SSO to Benefits Portal for Employees)
Yahoo! Benefits Squad (Access for Administration)

ONGOING CARRIER, PARTNER, AND POINT SOLUTION INTEGRATION VIA EDI OR API

- Effective dates, coverage amounts, changes in coverage
- API/SSO Integration
- Carrier Bill Payments
- EOI Integration

- Carrier Error Reports & Carrier and Billing Discrepancies sent to Your PlanSource Team

- Medical (UHC, Kaiser, HMSA), Rx (CVS, Kaiser)
- HSA (Fidelity)
- Dental (Aetna)
- Vision (VSP)
- Basic Life & AD&D
- Supp Life & Death & Dis AD&D
- STD/LTD
- HCFSA/DCFSA
- Vol Benefits

...And all other benefits

CONFIDENTIAL AND PROPRIETARY

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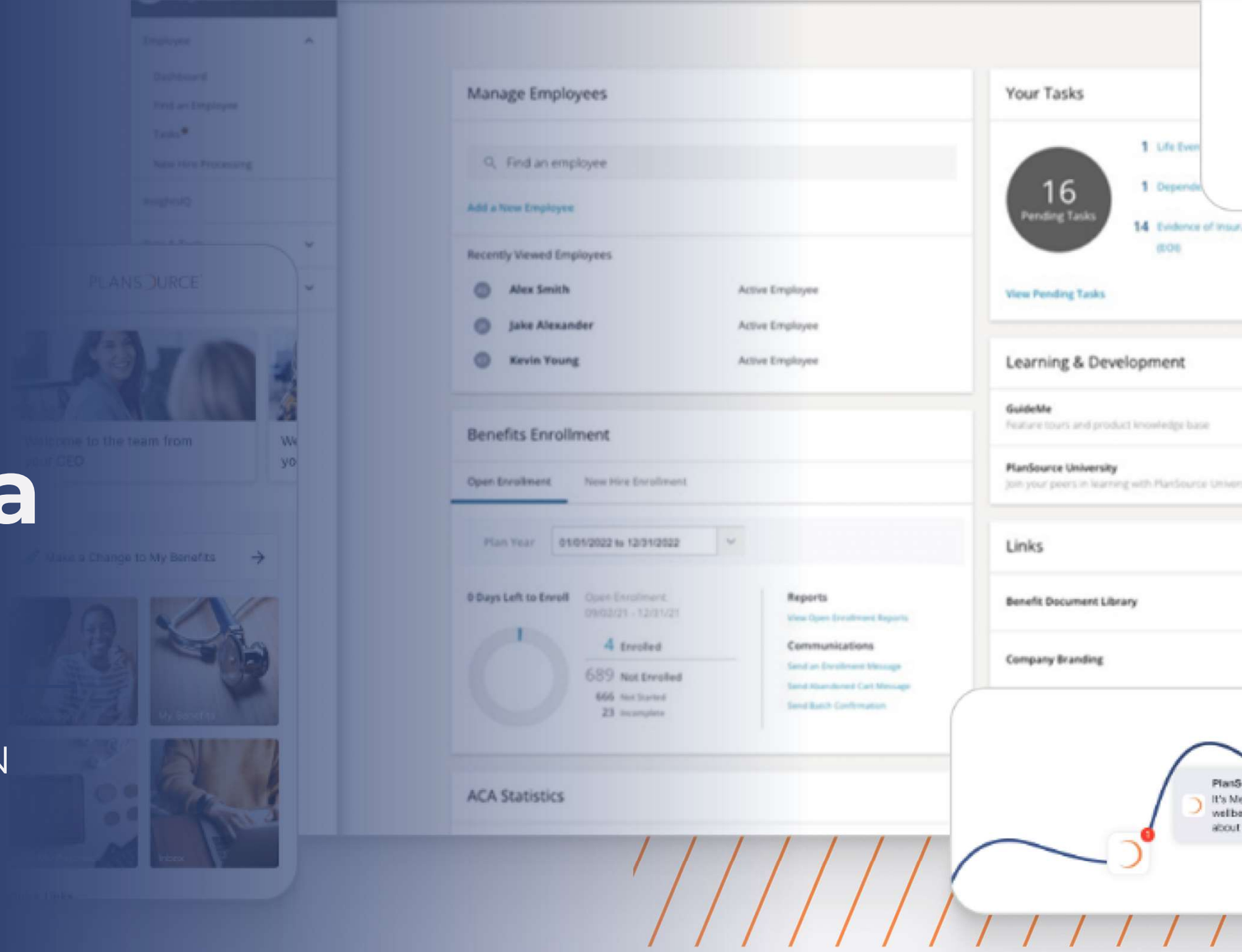
Let’s take a look

SYSTEM DEMONSTRATION



PlanSource Integrations

A partner program created to modernize the customer experience

MEET OUR BOOST PARTNERS [PlanSource Current Boost Partners]

MEET A FEW OF OUR 70+ Marketplace Partners
Yahoo! current relationships:

- Maven
- RethinkCare
- LegalEASE
- ID Watchdog
- Liberty Mutual, Home and Auto

[PlanSource Current Marketplace Partners]

Boost Partner Benefits:

MODERN API/SSO INTEGRATIONS that provide a real-time customer experience

SIMPLIFIED SELF-BILLING that eliminates the need to reconcile carrier bills

EMPLOYEE SHOPPING EXPERIENCE that's optimized to drive engagement

PREFERRED PRICING, discounted pricing when customers offer one or more Boost products

Marketplace Partner Benefits:

ACCESS to marketplace benefits, can be included on The Source to support a consistent shopping experience

PREBUILT EDI files to partners

OTHER marketplace offerings available

Operations

Implementation

PlanSource Support Model

Escalation Path 3
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IMPLEMENTATION

Niki Jackson
Implementation Project Manager
Victoria Edstrom
Implementation Benefit Consultant
Tony Adkins
Implementation Analyst
John Garvin
EDI Project Coordinator

BENEFIT SERVICES

Contact Center Support
COBRA Administration
Billing Team
ACA Administration
FSA/HSA Administration
Dependent Verification Team
QMCSO Team
Communications & Total Rewards Team

CUSTOMER SUCESS

Jennifer Wissler
Customer Success Director
Randi Bent
Customer Success Manager
Mel Miclat
Customer Account Analyst

Implementation Governance

PROJECT TEAM ALIGNEMENT

Personalized Team

Aligned Project Manager

SMEs Involved with Implementation:

- EDI
- API/SSO Integrations
- Contact Center
- COBRA
- Billing
- ACA
- Dependent Verification
- Practice Leadership
- Compliance

PLANNING & EXECUTION

Weekly Sales & Operations Staffing & Capacity review meetings

Clear client expectations/level of effort

Project plan with Milestones & Task Assignments

Weekly **Status Meetings** with Client Health Sentiment

Status Log, Risk Tracker, Open Items

BEST-IN-CLASS ARTIFACTS

Scope of Services

Requirements **Wizard**

User Acceptance Test Plans (access to masked production data)

Training Platform

Transition Timeline and Checklist

Administration Guide / Standard Operating Procedures

Processing Calendar

Annual Enrollment Guided Wizard

ONGOING SUPPORT

Executive **sponsorship**

Governance oversight:

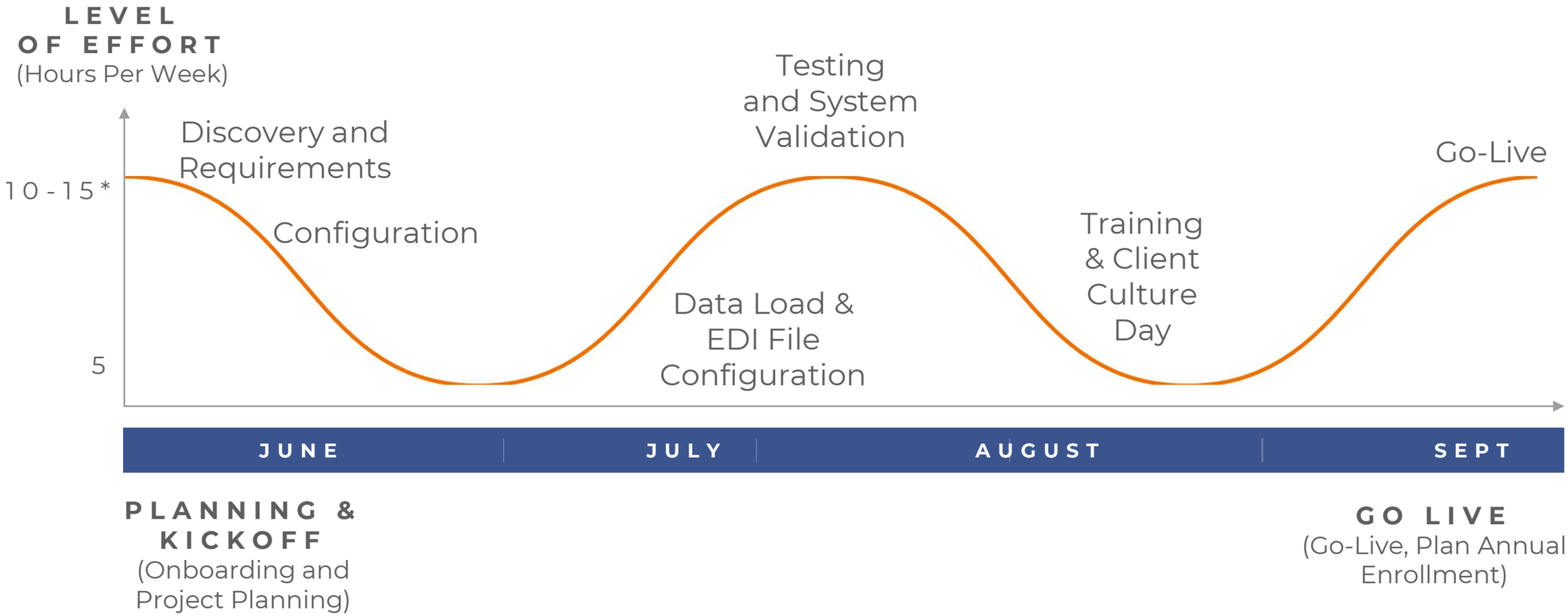
- Weekly Health Reviews
- Quarterly Business Reviews
- Annual Stewardship

Release Education & Technology Roadmap

Implementation Timeline

MILESTONE TIMELINE	START DATE	END DATE	INVOLVEMENT
Kickoff & Scope of Services Review	**6/12/24**	**6/17/24**	**PlanSource Team + Yahoo! Benefits Squad**
Discovery/Plan Requirements	6/18/24	7/1/24	PlanSource Team + Yahoo! Benefits Squad
Configuration of Enrollment Platform	7/2/24	7/12/24	PlanSource Team
PlanSource Testing & QA Review	7/12/24	7/21/24	PlanSource Team
Data Requirements (Employee & dependent demographics; and Volume based benefit coverages (example: Basic Life and AD&D, Sup Life and AD&D, STD/LTD, Critical Illness in to the 2025 plan year)	7/16/24	7/16/24	PlanSource Team + Yahoo! Benefits Squad
Demo of Site	**7/21/24**	**7/22/24**	**PlanSource Team + Yahoo! Benefits Squad**
Acceptance Testing & Review	7/23/24	8/25/24	PlanSource Team + Yahoo! Benefits Squad
Data Load Employee & Dependent Demographic info	8/26/24	9/4/24	PlanSource Team + Yahoo! Benefits Squad
Data Load Coverage Data (Volume based benefit coverages (example: Life, Disability, Critical Illness in to the 2025 plan year).	9/5/24	9/17/24	PlanSource Team + Yahoo! Benefits Squad
Data Validation	**9/18/24**	**9/26/24**	**PlanSource Team + Yahoo! Benefits Squad**
Administrative Training & Client Culture	9/27/24	9/30/24	PlanSource Team + Yahoo! Benefits Squad
System Signoff	9/27/24	9/27/24	Yahoo! Benefits Squad
Soft Go Live & Continue Plan for Annual Enrollment	**10/1/24**	**10/1/24**	**PlanSource Team + Yahoo! Benefits Squad**
Annual Enrollment	**October 2024**	**November 2024**	**PlanSource Team + Yahoo! Benefits Squad**

Yahoo! Benefits Squad's ‘Level of Effort’



PLANNING & KICKOFF
(Onboarding and Project Planning)

GO LIVE
(Go-Live, Plan Annual Enrollment)

*Level of effort will vary depending on data integrity and requirement detail

Operations

Customer Success

Customer Success Philosophy

People

Empathy

Curiosity

Problem Solving

Subject Matter Expertise

Process

Best Practices

Documentation

Project Governance

Transparency

Technology

Innovation & Investment

Carrier/Partner Integrations

Release Education

Client Feedback

Driving Successful Partnerships

DAY-TO-DAY SUPPORT

- Support for administrative questions
- Training and Education
- Day-to-Day site navigation assistance

WEEKLY GOVERNANCE & ADMINISTRATION

- Weekly status call
- Review Action Items tracker
- Outsourcing, event approval, dependent verification, eligibility processing and platform review
- EDI Status Updates
- System Change Management

MONTHLY PARTNERSHIP OVERVIEW

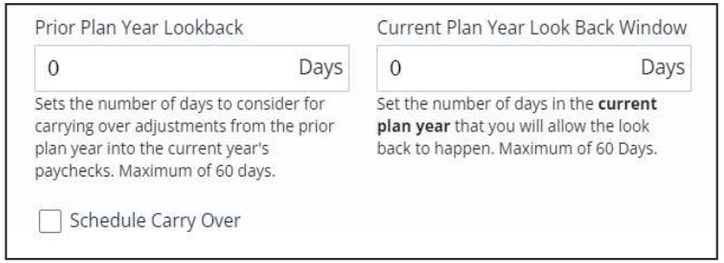
- Review Client Health Sentiment (Quarterly)
- System Quality-Validation reports
- Assist with ACA monitoring report
- Ad hoc Project Management

ANNUAL ENROLLMENT

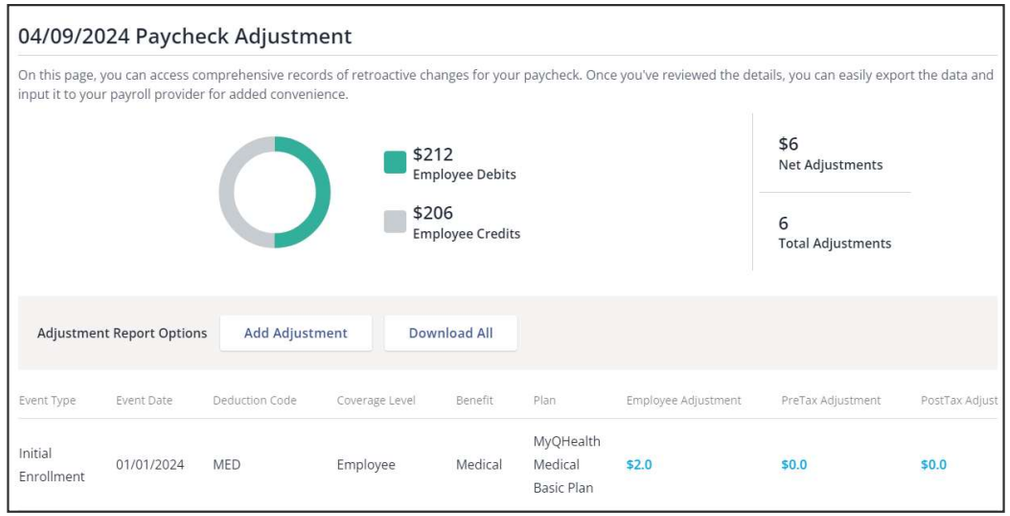
- AE Survey Completion
- Detailed project planning and tracking
- Guided renewal tool walkthrough
- Configuration and Testing
- Annual Enrollment Pre & Post Audits
- EDI & Payroll File Management

RETROACTIVE PAYROLL

Flexible Configuration



Dynamic Dashboard



EDI to Payroll Vendors

Retroactive Payroll eliminates the manual efforts HR teams execute each payroll cycle to identify, calculate, validate and apply missed employee premium payroll deductions to future payroll cycles (due to retro enrollments for new hire and life events, etc.).

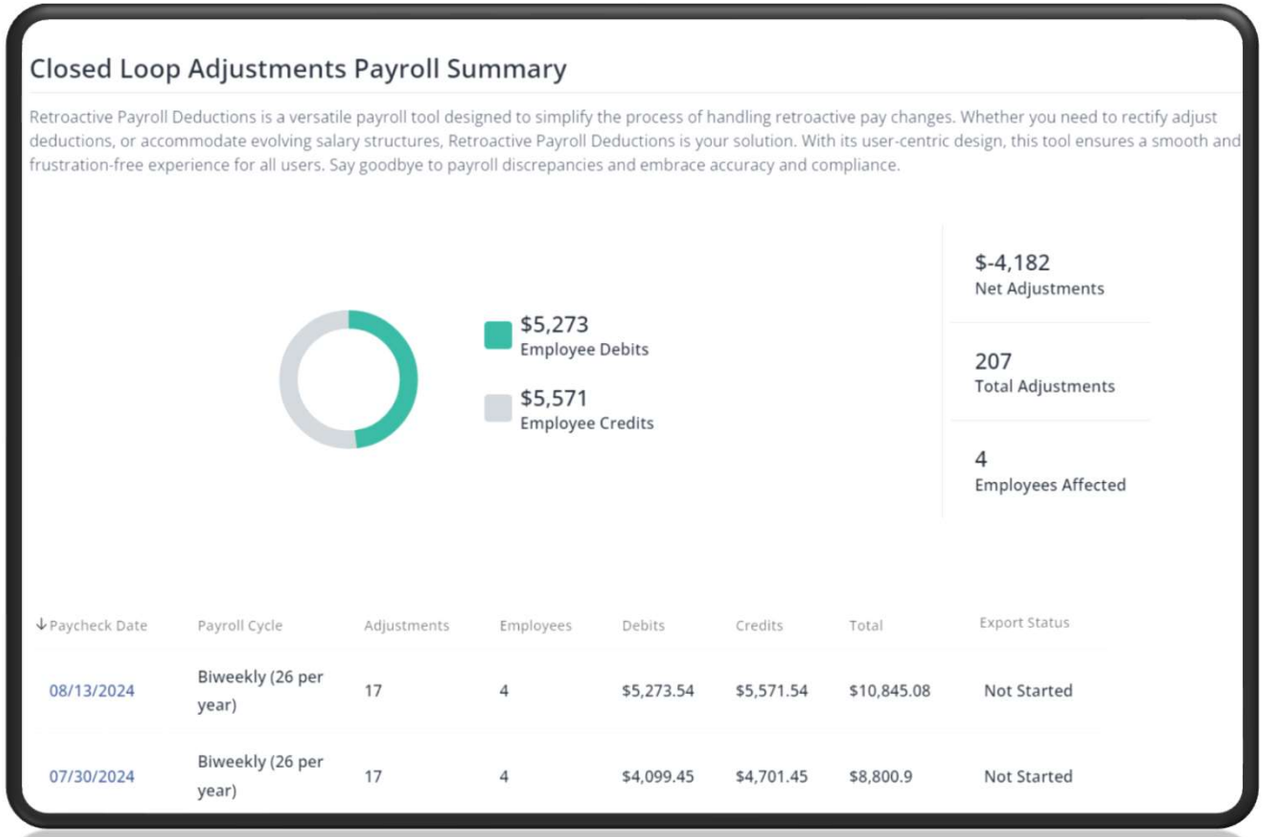
Retroactive Report or EDI file: Breaks up payments for larger balances due to retroactive events:

- no cap – pass entire balance
- caps at a factor of the current deduction amount
- caps at a % or flat $ amount of the current deduction amount.

CLOSED LOOP PAYROLL

Systems Harmony – Automation – Transparency

- ✓ **Automation** of identification and calculation of payroll deduction adjustments (credits/debits)
- ✓ **Choose to have FSA/HSA benefits either re-amortize or trigger singular adjustments**
- ✓ Ability to change, clear or add adjustments
- ✓ Bi-directional payroll deduction data systematically reconciled each pay cycle to keep systems in sync
- ✓ Accounting style record keeping
- ✓ **Intuitive and Informational Adjustment Dashboard**
- ✓ Payroll Home/Find Paycheck Dashboards provide historical access to each payroll cycle
- ✓ **Transparent and supplemental reporting included**



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Product Roadmap

Three-Horizon View

HORIZON 1
(Now to 12 months)

Annual Enrollment Prep
Carrier Integration Acceleration | Technology Systems capacity and speed increases | Annual Enrollment Guided Tool Enhancements

New Products
New Employee Experience Mobile & Desktop | The Source | Retroactive Payroll | Closed Loop Payroll | Olive Create (Gen AI) for enhanced communications

HORIZON 2
(1 year to 4 years)

Benefit Engagement
Enhanced integrations with Marketplace Partners for The Source | Provider cost and quality tool integration | Direct connect with Telehealth

Innovation for Ben Admin
Predictive Administration | AI-driven HR Experience | Financial wellness integration | Continued HCM Integrations

Artificial Intelligence & Self-Service Enhancements
Gen AI integration with Chatbot for Employees | Service improvements through Gen AI | Packaged benefit suggestions for employees

HORIZON 3
(5 years+)

Open Platform
Integration self-service | Open API marketplace
Consumer payment | Web components

Artificial Intelligence
Automated configuration checks | Predictive Benefits Optimization

Advanced Tech
Voice navigation | Automated compliance management

Industry Changes
Continued compliance of evolving industry trends and regulations

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Thank you!