PLANSOURCE

Helping people live happier, healthier lives by maximizing the benefits of their benefits

Customer
Winter Release Preview

TODAY'S SPEAKERS

IDAMARIE DOVER
Product Operations Manager

JOHN WILSON
VP, Product Management

MADISON GRASTY
Sr. Manager, Product Management

ERIKA MUNK
Product Manager

AGENDA

2022 in Review

The Source

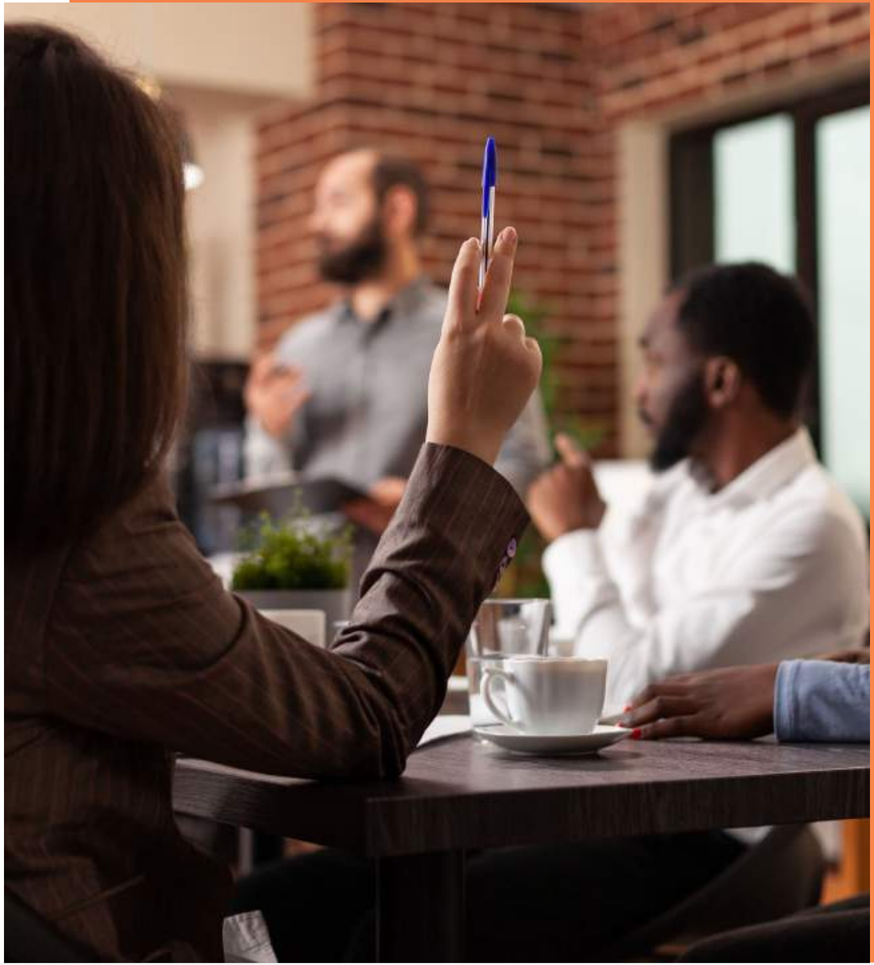
Ecosystem Integrations

ACA

Customer Experience Enhancements

2023 Roadmap Preview

Resources



2022 ACCOMPLISHMENTS

Focuses on reducing friction, performance and customer commitments

- **Email-less username and password reset**
- Premium Billing UI update
- Updated payroll schedules
- API Observability improvements
- ACA updates for smoking costs
- Performance improvements across the platform
- **Capacity planning for ‘22 OE**
- Dozens of new benefit types
- Email campaign enhancements
- InsightsIQ dashboard refresh
- **Guided Renewal v2**
- Templated Boost Content
- Mobile SSO enhancements
- Improvements to HSA algorithms
- Multi-document DependentIQ
- DecisionIQ and Dependent IQ ROI Dashboards
- Additional voluntary products added to DecisionIQ
- **Refreshed Spanish Translation**
- EDI management enhancements

WINTER RELEASE THEMES

Enhancing communications and engagement

Reducing friction for all user types

Expanding the benefits ecosystem

Building a frictionless benefits experience, relevant 24/7/365

The Source

THE CHALLENGE

15 MIN

EMPLOYEES SPEND CHOOSING BENEFITS

$10,000

EMPLOYERS SPEND PER EMPLOYEE

80%

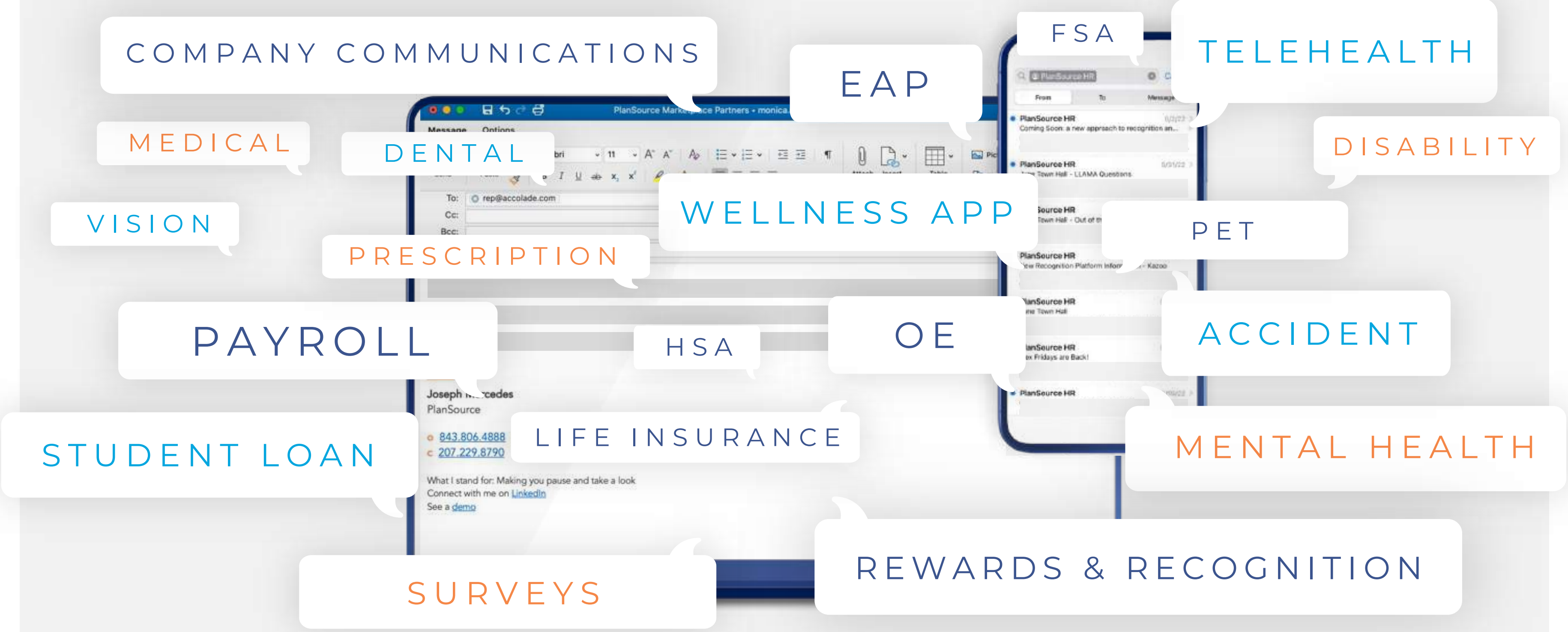
COMPANIES SAY EMPLOYEES DON'T READ COMPANY COMMUNICATIONS

85%

ADULTS HAVE A SMARTPHONE

Employees Are Bombarded with Benefits & Initiatives

For the benefit of the employees, HR is constantly launching company initiatives



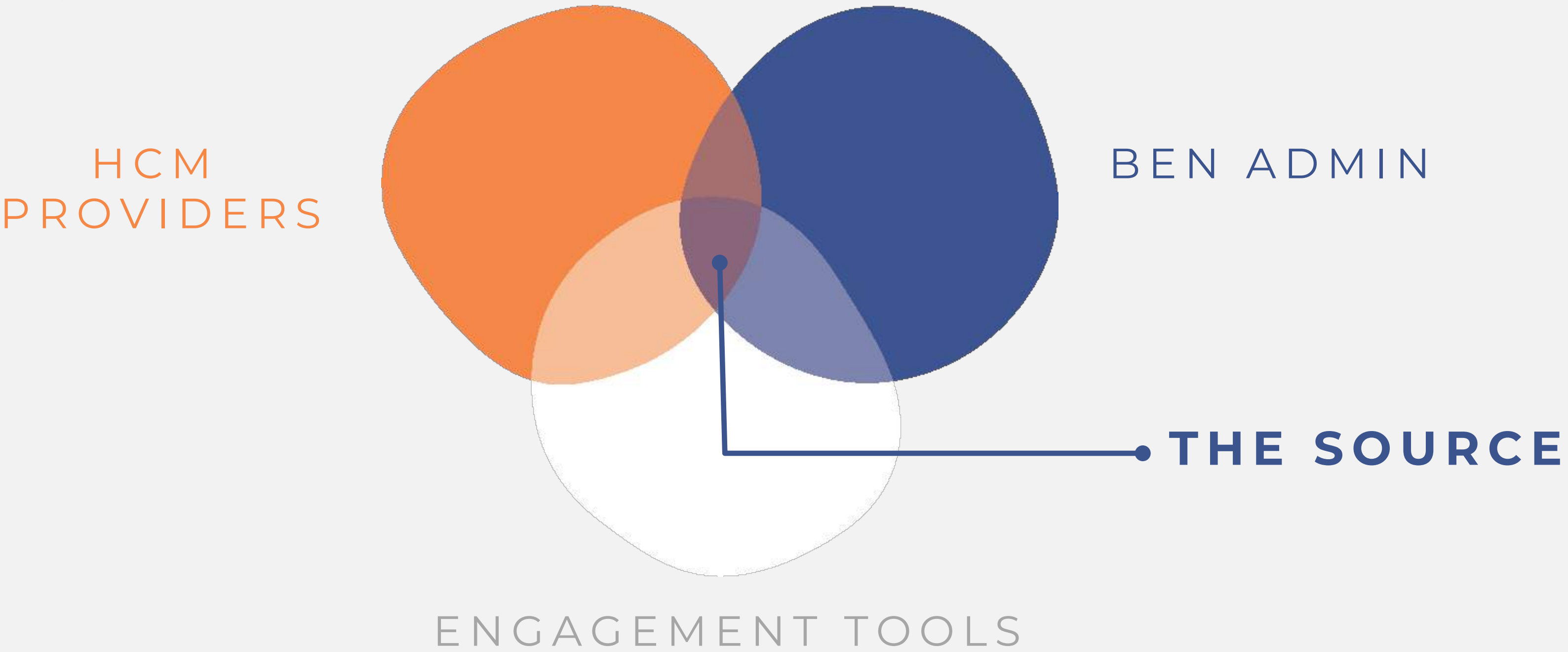
Multiple Systems to Access
Health Benefits + Point Solutions + Company Info

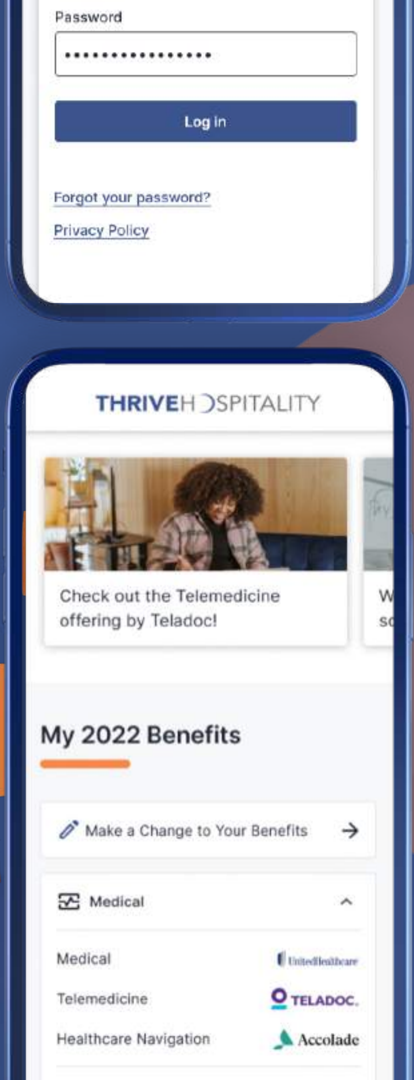
SELECTIONS MADE BY CUSTOMERS GET LOST IN THE FLOW OF DAILY LIFE

A. Apps are spread across mobile phones via individual apps
B. Employees come into our platform annually
C. Not all employees have a work email so customers cannot reach everyone
D. Many plans and benefit options are across intranets or other portals

The Source

Creating interoperability for the HR professional





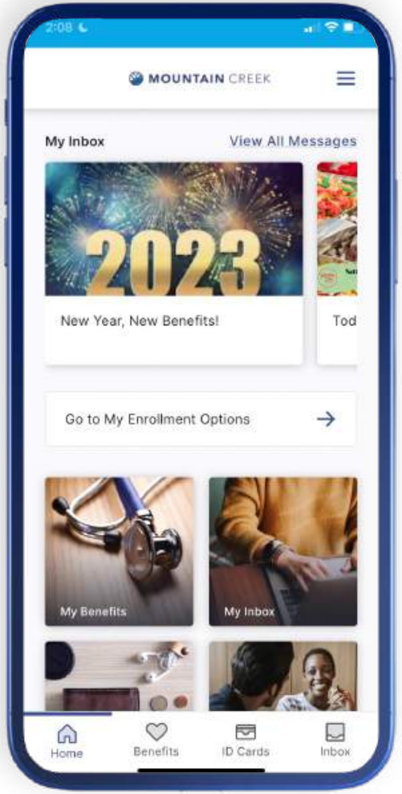
THE SOURCE

Making company news, initiatives and benefits relevant 24/7/365

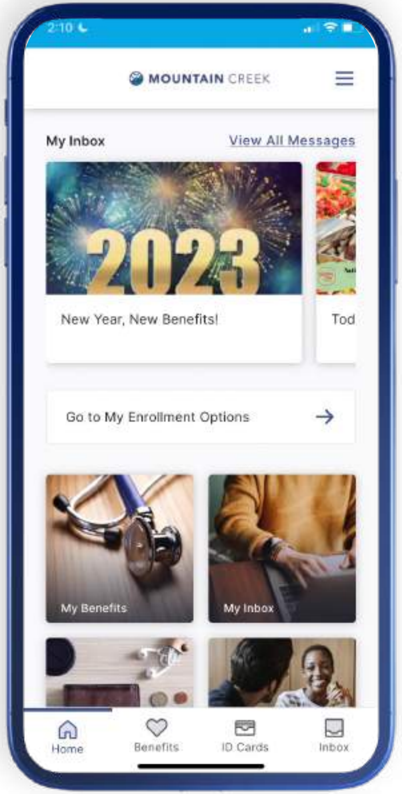
GENERALLY AVAILABLE

Employer Branding

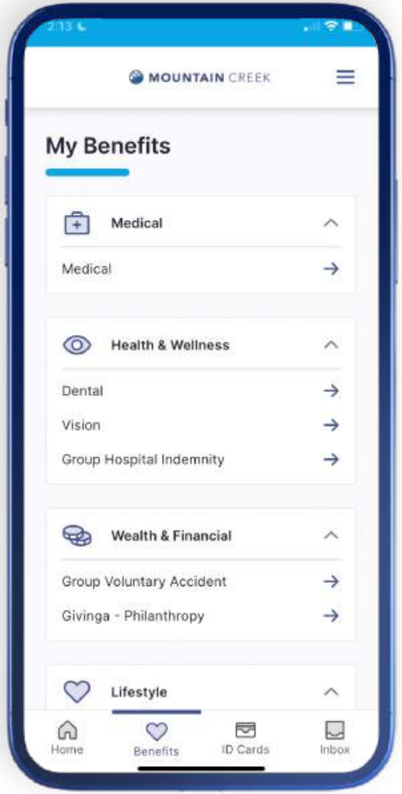
In-App Communications



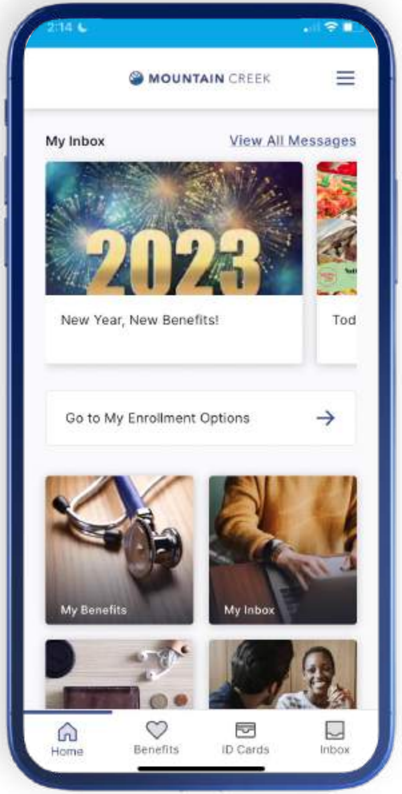
Benefits Enrollment



My Paycheck & My Company

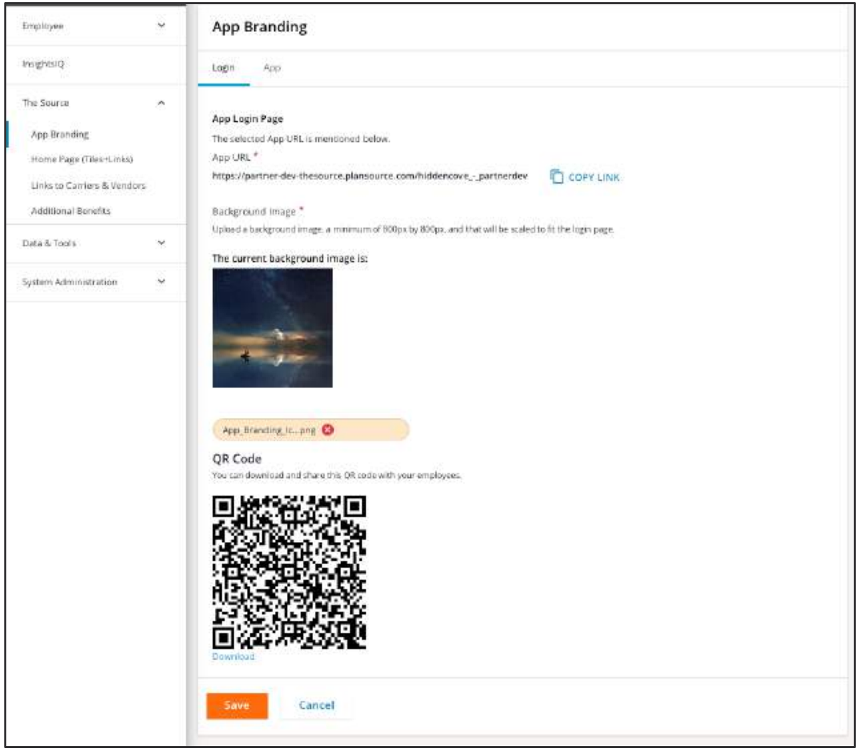


Quick Links


2:14
MOUNTAIN CREEK
My Inbox
View All Messages
2023
New Year, New Benefits!
Tod
Go to My Enrollment Options
My Benefits
My Inbox
Home
Benefits
ID Cards
Inbox

QR Code
in App Branding

- Static QR Code available for download
- HR Admins can use this to distribute The Source URL for employee use (via email, paper copy, etc.)



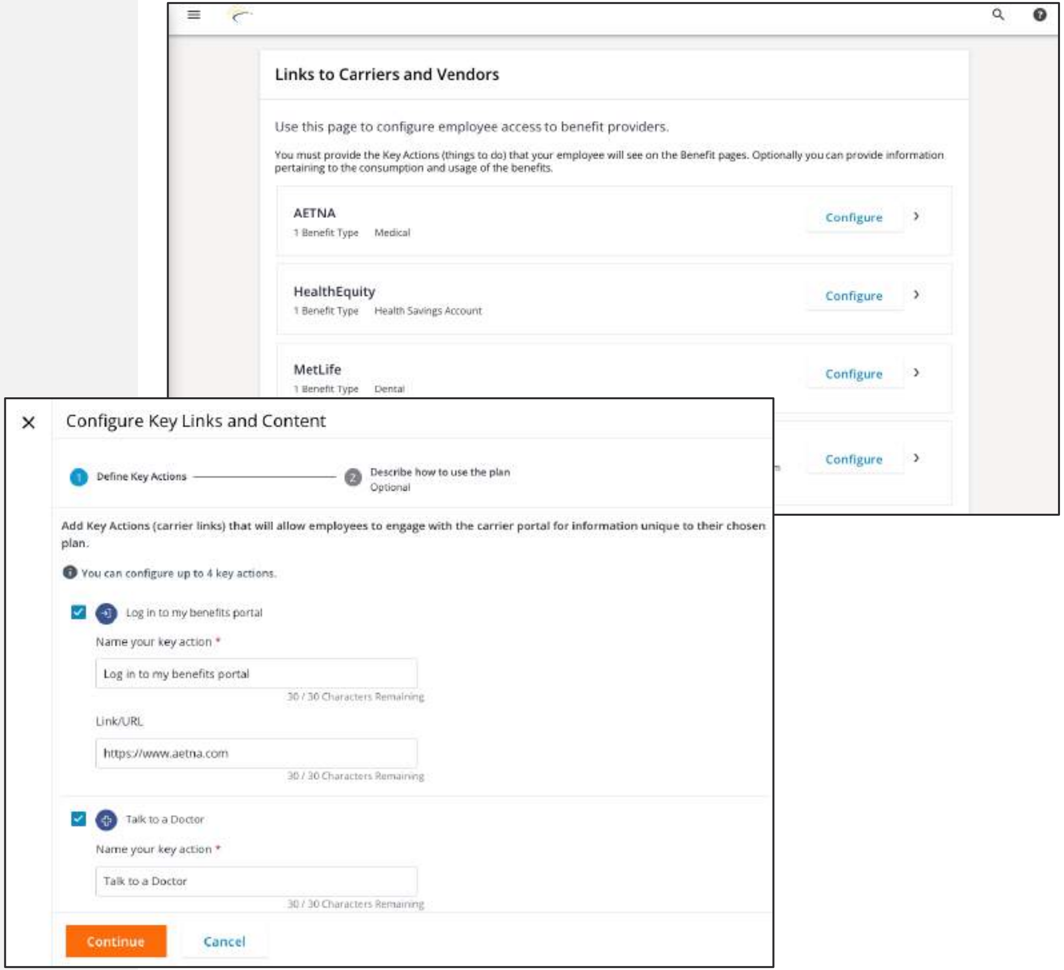
COMING SOON WITH THE WINTER RELEASE!

Key Actions
on Benefit Pages

- 4 Key Action links available to be added and customized on every benefit page

- Examples:
  - Log in to my benefits portal
  - Talk to a Doctor
  - Visit my Provider

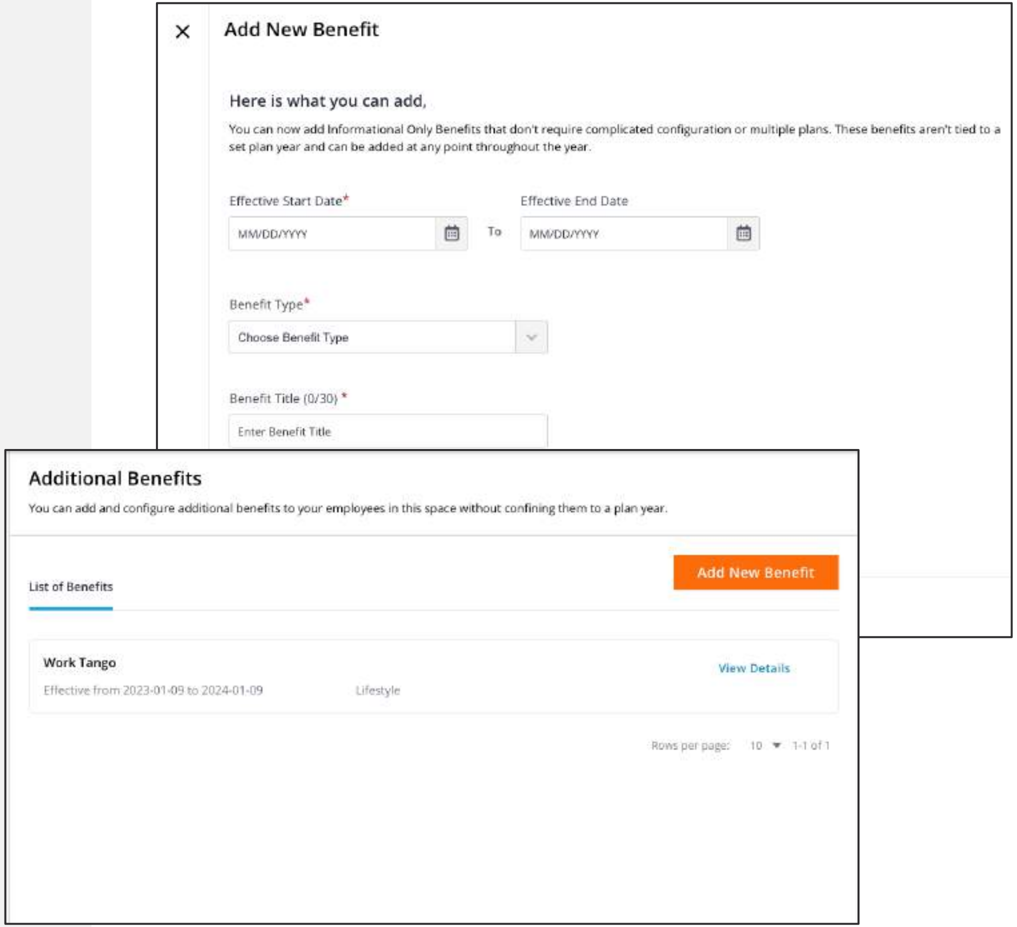
COMING SOON WITH THE WINTER RELEASE!



Informational Benefits
in The Source

- Ability to add and configure additional benefits for employees without confining them to a plan year

- You can also supplement these with key actions and extra benefit details!



COMING SOON WITH THE WINTER RELEASE!

Ecosystem Integrations

Madison Grasty

New Integrations

360-API Integrations and Employee SSO

paylocity

SAP SuccessFactors

2023 Upcoming Integrations

Early Adopter Programs begin in the first half of 2023

AMERITAS
Enrollment API

MetLife
Enrollment API

THE HARTFORD
Enrollment API

AFLAC
Enrollment API

RELIANCE STANDARD
EOI-SSO
EOI-Decisions

LINCOLN FINANCIAL GROUP
EOI-Decisions

THE HARTFORD
EOI-Decisions

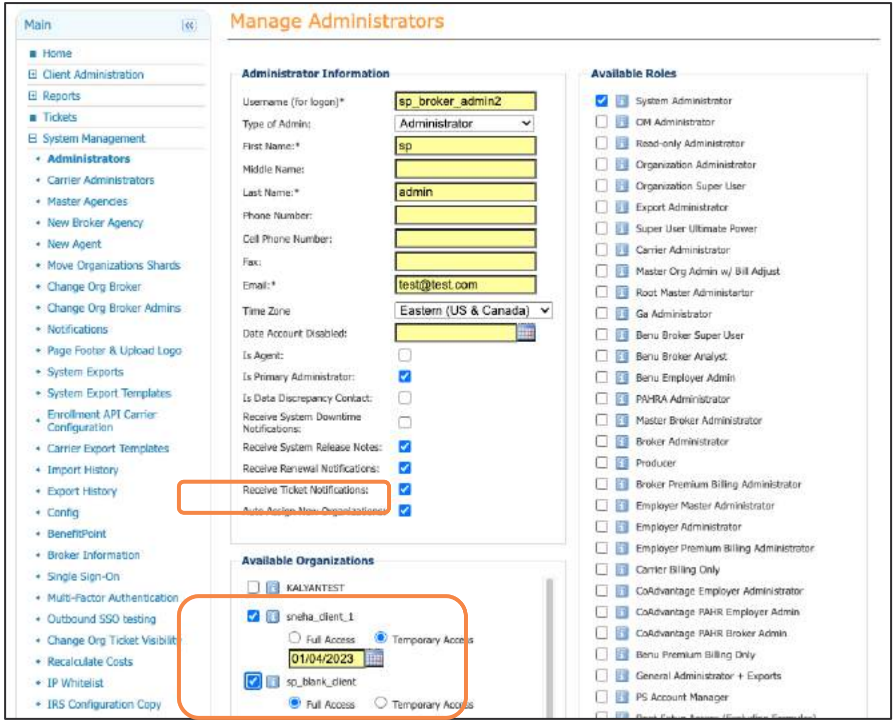
Access Management
for Broker Administrators

Auto-Assign New Organizations

- Capability reveals a new checkbox on broker administrators profile allowing them to be automatically assigned to newly created organizations instead of having to assign new organizations each time one is created.

Administrator Expiration Dates

- Capability provides the ability for an administrator to assign a user access to an organization for a specific period (i.e., expiration date)



ACA Filings and Customer Experience Enhancements

Erika Munk

ACA 2022 Highlights

Email Notification

Email notification will be sent to PlanSource ACA Fulfillment team when an employer has enabled ACA reporting and forms have already been mailed

Annual Updates

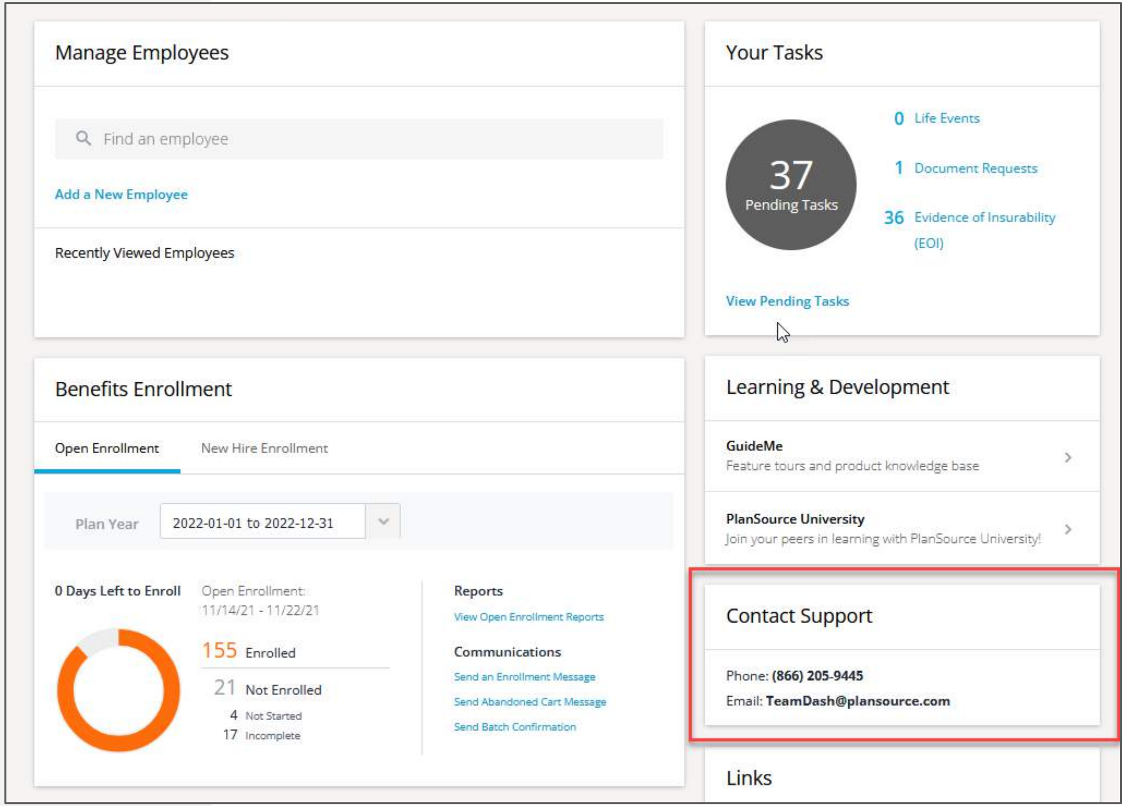
Annual regulatory updates were completed in the system and for 2022 to both the forms and transmission engines for 2022 filing

Optimization Improvements

Enhancements were made to the ACA module to increase performance and ease of reporting

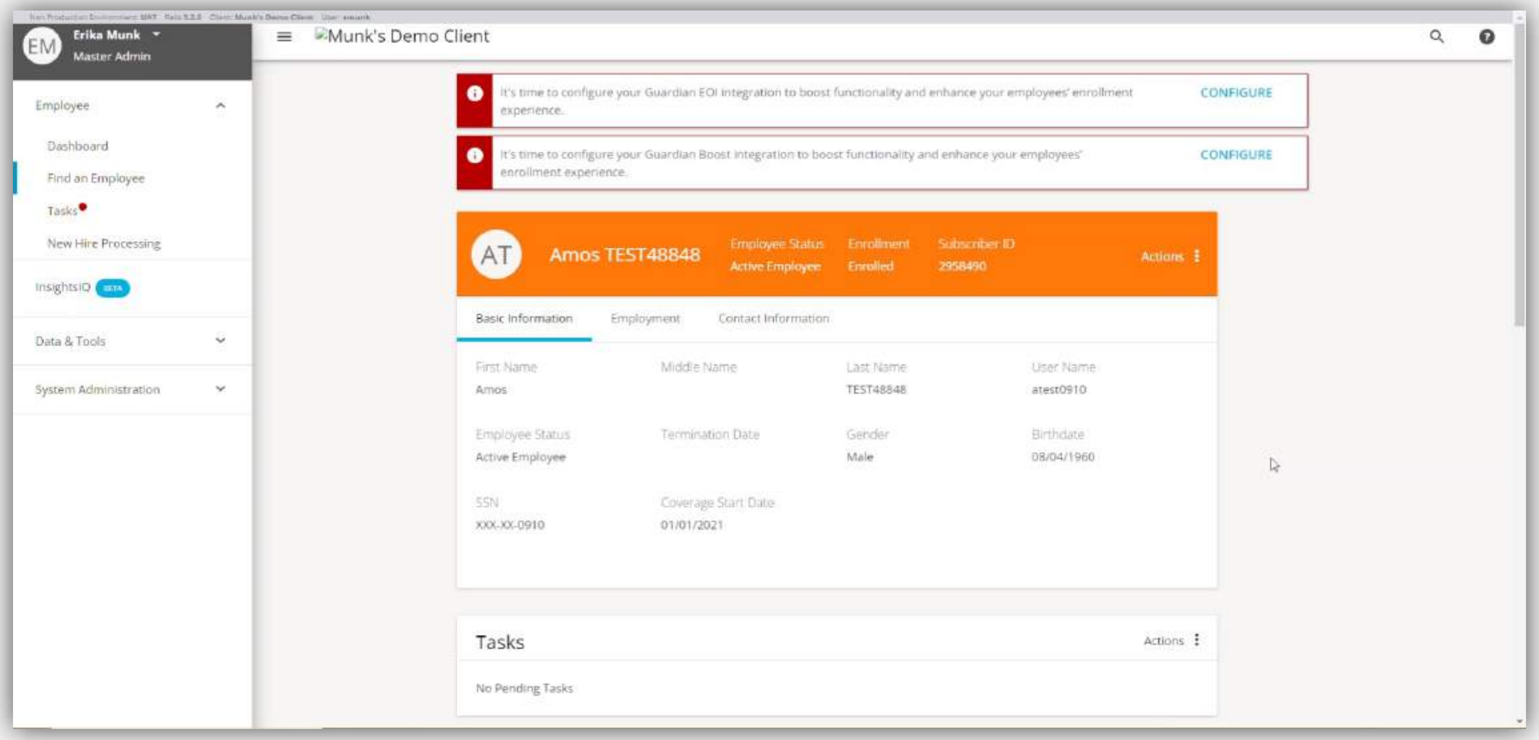
Contact Us

- Available on Employer Admin Dashboard
- Clients assigned to the PlanSource Core team will see the tile
- Core Team phone number & email address are displayed



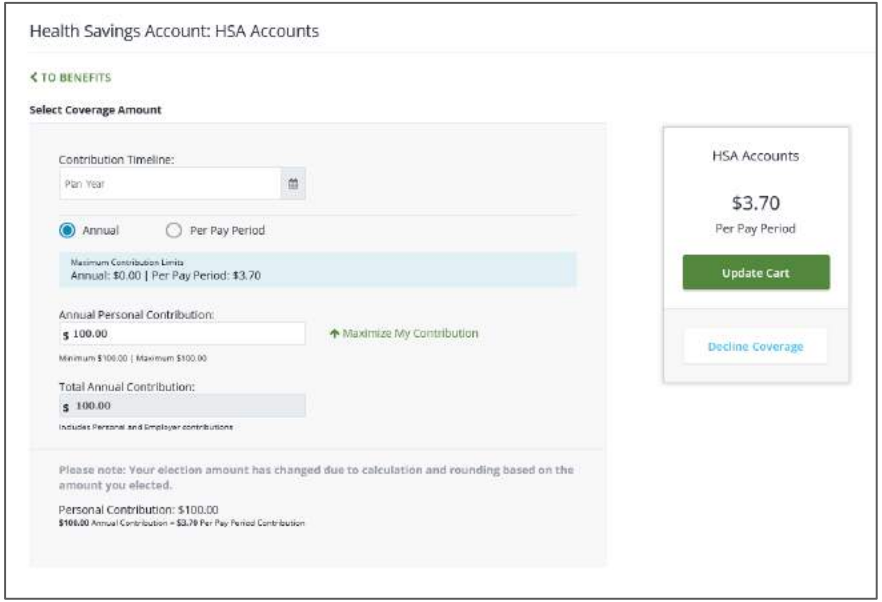
Document Deletion

Administrators can delete documents at the Admin & Employee levels



HSA Calculation Toggle

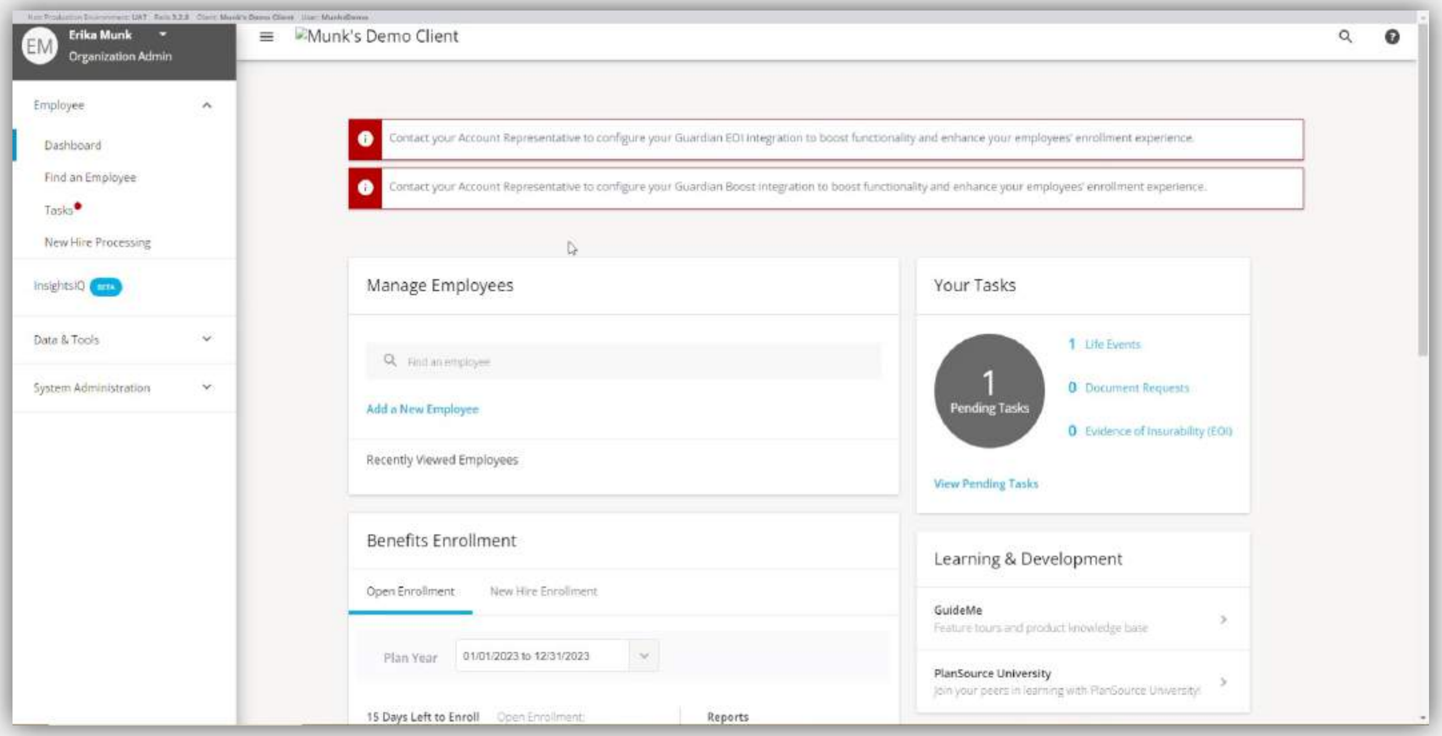
- **Problem**: Under certain circumstances, incorrect calculations and rounding errors occurred with *HSA and FSA* deductions.
- **Solution**:
  - Simplified the HSA/FSA deduction calculation to make it more accurate and consistent in all scenarios
  - Introduced a new audit system to track changes that occur throughout the year
  - Addressed known HSA and FSA calculation bugs



Toggle Enabled on December 27, 2022

Read-Only Configuration Access

Grants access to all information in configuration in read-only mode, including Configuration Report



Customer Experience Highlights

SPANISH TRANSLATION

Refreshed Spanish translation for employee experience & removed the Espanol PR as an option

SSO UPDATES

Removed access to Legacy & OAuth 2 options and moved from Username to SSO ID for Administrator verification

GENDER U/X

Gender U and X support now available in:

- Reports – Employee Census Report
- Batch Demographic Import
- Data Imports
- EOI Data Payloads

CONFIG UPDATES

Plan level options have been moved from under the advanced tab to the main plan page

Benefit level options have also moved so they display next to each other

Q&A

2023 RELEASE SCHEDULE

Continuous Investment and Innovation

SPRING
April

WINTER
January

SUMMER
August

Major releases three times per year with a published release schedule. Learn more at releases.plansource.com

Transparent release communications, including a web page, webinars, training videos, and in-system and e-mail notifications