



HealthFlex Summit–October 2022



Wespath
BENEFITS | INVESTMENTS

Plan Sponsor Experience Update

Agenda

- Meet the Health & Wellness Team
- Optimizing Your Experience—Recap
- Service Improvements Updates—
Past, Present and Future
- Questions?



Meet the Health and Wellness Team



Cheryl Johnson



Janet Monaco



Teresa Wilson



Alicia Jordan



Pedro Reno



Joanne Hinrichs,
Supervisor

- **Advocacy**
- **Expertise**
- **Service**

Recap: Optimizing Your Experience

Goal: Exceeding Expectations

- Best user experience (participant and plan sponsor)
- Understandability of benefits
- Thorough evaluation of alternatives
- Rationale for decisions



Optimizing Your Experience

What We've Heard

- Some documents are repetitive or difficult to understand
- Forms add time to enrollments
- Better reporting desired
- Earlier access to ID cards for new hires



Service Improvements



Past



Present



Future



Implemented HealthFlex User Group

Formalizing Feedback

- Initial group of 7 plan sponsor representatives
- Kick-off meeting was June 29th
- Determined format and frequency
- Prioritization
- Homework: Sub-AA Tips document review

Participant-friendly
More
Self-Service
Communication
Efficiency
Feedback
Listening
Understanding
Confirmations

HealthFlex Plan Sponsor User Group

- Initial meeting outcomes:
 - Meet 3-4 times per year
 - Provide feedback on solutions
 - Brainstorm and identify improvements
 - Review and prioritize improvement opportunities
 - Discuss options
 - Review rationale for decisions





Sub-Adoption Agreement Tips

Challenge:

Need clearer communication of timeframes for completing administrative tasks

Action taken:

Created a New Sub-Adoption Agreement Tips Sheet and solicited feedback from User Group—No changes identified

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A [Sub-Adoption Agreement](#) (Sub-AA) allows a salary-paying unit (SPU) affiliated with your conference to offer HealthFlex for its lay employees. By sub-adopting HealthFlex through your conference, the SPU agrees to provide the same default plans and premium credit that you elected in your Exhibit A and Exhibit B. It is up to the conference if it wants to allow an SPU to sub-adopt HealthFlex. By doing so, the conference bears the responsibility of collecting premiums from the SPU and remitting them to Wespath.

Processing & Responsibilities:

TIP—The Sub-AA must be approved by the conference and Wespath. If you have questions regarding the eligibility of an entity to sub-adopt HealthFlex, please reach out to the Health & Wellness Team at healthteam@wespath.org.

- Send the signed Sub-AA to healthteam@wespath.org
- Knowing who you expect to be covered will help us ensure the systems are appropriately updated
 - If possible, please provide a census or list of those who should be covered (including dependents)
 - If the participants and dependents do not exist in Benefits Access Portal (BAP), they must be added prior to the effective date
- Reach out to the Health & Wellness Team for status updates

TIP—Wespath will need to confirm that the sub-adopting group is tax-exempt and sufficiently Methodist-affiliated. The sub-adopting organization may need to provide a copy of its Articles of Incorporation, Bylaws, and tax-exempt/501(c)(3) ruling letter.

Updating Participants:

TIP—HealthFlex Plan Sponsors may not have access to view, or update, lay employees of churches and other SPUs in BAP. Submit a [HealthFlex Enrollment/Change Form](#) for the individuals who need coverage.

- Participants must be added into BAP and must feed over to Benefitsolver before they can be enrolled in HealthFlex plans
 - Please allow time for the participants/dependents to be added into BAP, as well as one full day for that data to be reflected in Benefitsolver
 - Once eligible participants have fed to Benefitsolver, they can be enrolled into HealthFlex plans

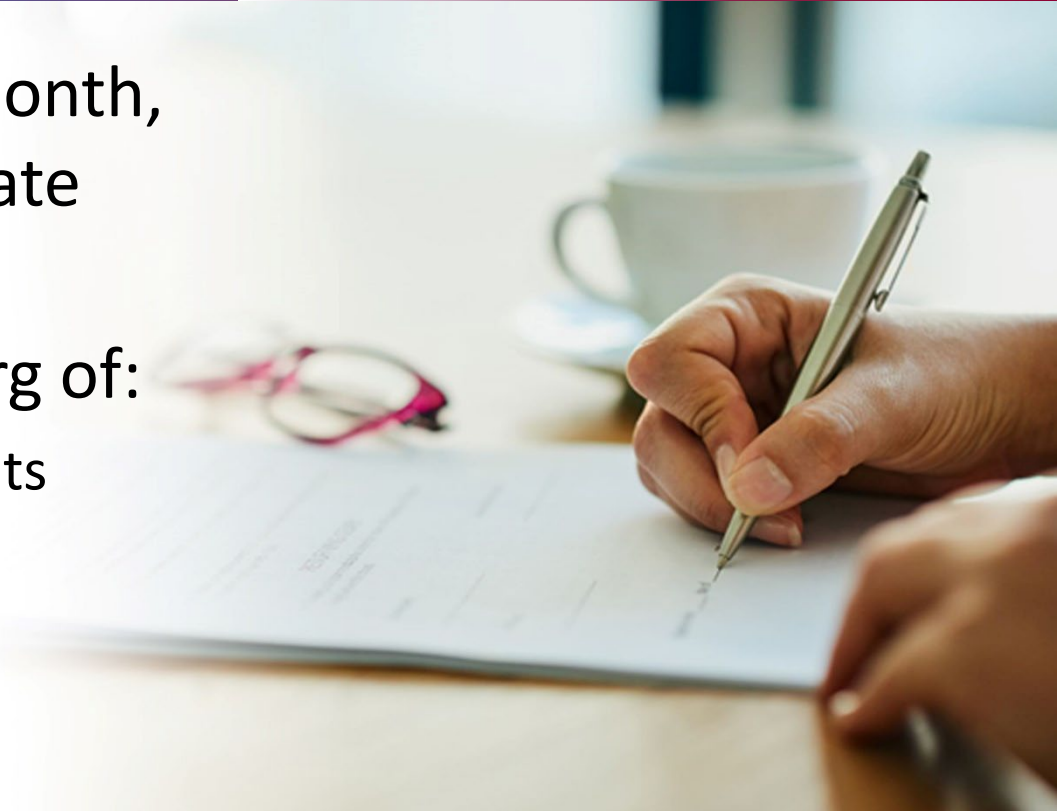
Timing:

TIP—The Sub-AA must be received by Wespath by the 10th of the month prior to the effective date. This allows Wespath time to complete any necessary system setup.

- Once the participants and dependents have been added to the system, coverage can be selected by the participant or by the plan sponsor in Benefitsolver.
 - Enrollment must be completed within 30 days of the effective date
 - Any enrollments, including personal flexible spending account (FSA)/health savings account (HSA) contributions elected after the 5th of the current month will be reflected on the next month's invoice.

Sub-Adoption Process: Key Takeaways

- Deadline: 10th of the month, prior to the effective date
- Key Tasks for Plan Sponsor
Inform sub-adopting org of:
 - Rates and premium credits
 - Enrollment window
 - HealthFlex information





Understandability of Benefits

Challenge:

Members have different information needs during AE

Action taken:

New Annual Election Microsite

- AE information
- Plan highlights information
- Links to detailed documents
- Videos, examples, and more

HEALTHFLEX ANNUAL ELECTION
Made Simple

If you want to feel confident in the health plans you select during Annual Election, you've come to the right place. This page has an easy-to-follow breakdown of HealthFlex so you can understand your choices. The ALEX® Benefits Counselor automated tool in [Benefits Access](#) can then provide personalized recommendations for plans and health account contributions. Soon you'll be ready to make your elections from November 2-17 in [Benefits Access](#).

- How HealthFlex Works**
What do HealthFlex plans cover? How much will I owe at the doctor? Get answers to these questions and more.
[Learn How HealthFlex Works >](#)
- Health Account Advantages**
HSAs, HRAs and FSAs can all save you money, but they do it in different ways. Is a health account right for you?
[Learn the Advantages of a Health Account >](#)
- Dental and Vision**
In addition to medical plans, you also can choose between up to three dental plans and three vision plans during AE.
[Learn About Dental and Vision Options >](#)
- Personalized Recommendations**
If you understand your choices, then it's time for the ALEX automated tool. ALEX recommends plans and health account contributions.
[Log into Benefits Access to Reach ALEX >](#)

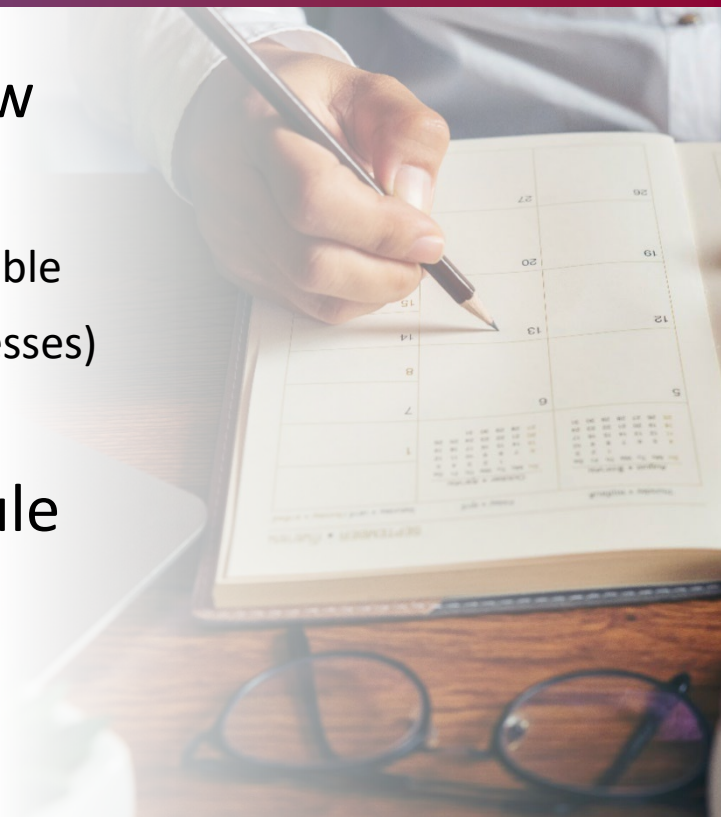


We want to hear from you!



Currently in the Works

- Optimal timing and processes for new hires/newly eligible enrollments
 - Analysis was completed—determined this is feasible
 - Need to minimize risk (impacts many other processes)
 - Q1 – 2023 develop scope document
- Create and publish an invoice schedule
 - 2023 Invoice schedule will be delivered post-AE
- Streamlining HSA reporting
 - Evaluating ability to report out of HealthEquity





Currently in the Works

- **Build-a-Report Functionality**
 - Ability to create custom extracts/reports in Benefitsolver
 - Utilizing for our AE testing
 - Will evaluate as alternative for existing reports
- **Updated New Hire plan/enrollment information**





Currently in the Works

- Via Benefits Reporting
 - Via Benefits has an Enrollment Guide and a Reporting procedure available
 - Willing to host a training webinar
 - Let me or your CRM know if you are interested and we will schedule 1–2 options





Requiring Additional Analysis

- Ability to send confirmations
 - Electronic notification to protect PHI
- New participant education opportunities
 - Webinars/videos
 - Understanding benefits
 - Consumerism





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