



HealthFlex Mini Summit – March 16



Wespath

BENEFITS | INVESTMENTS

Administration and Service Improvements—Past, Present, and Future

Agenda

- Optimizing Your Experience
- Service Improvements—
Past, Present and Future
- Creation of a HealthFlex User Group



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



Streamlined HealthFlex Plan Documentation

- Challenge: Some documents repetitive and difficult to understand
- Action taken: Updated Summary Plan Description (SPD), Benefit Booklet, Plan Sponsor Manual and Plan Document
 - SPD and Plan Sponsor Manual updated in 2021
 - Single Benefit Booklet—finalized early Q2 2022
 - Plan Document will be finalized in Q2 2022



Improved Self-Service

- Challenge: Reduce need for forms
- Action Taken: Job aid creation and training
 - ~570 transactions processed in 2021 by plan sponsors! (compared to 120 in 2020)
 - Only 50 transactions processed in 2021 by participants (not including AE) which is almost the same as 2020.





Options for Deacons

- Challenge: Plan sponsors have different cost-share rules for Deacons in HealthFlex
- Action taken: Allow plan sponsors to designate if Deacons are to be treated as Lay or Clergy for premium credit purposes
 - Updated the Adoption Agreement Exhibit B
 - Captured each Plan Sponsor's intent



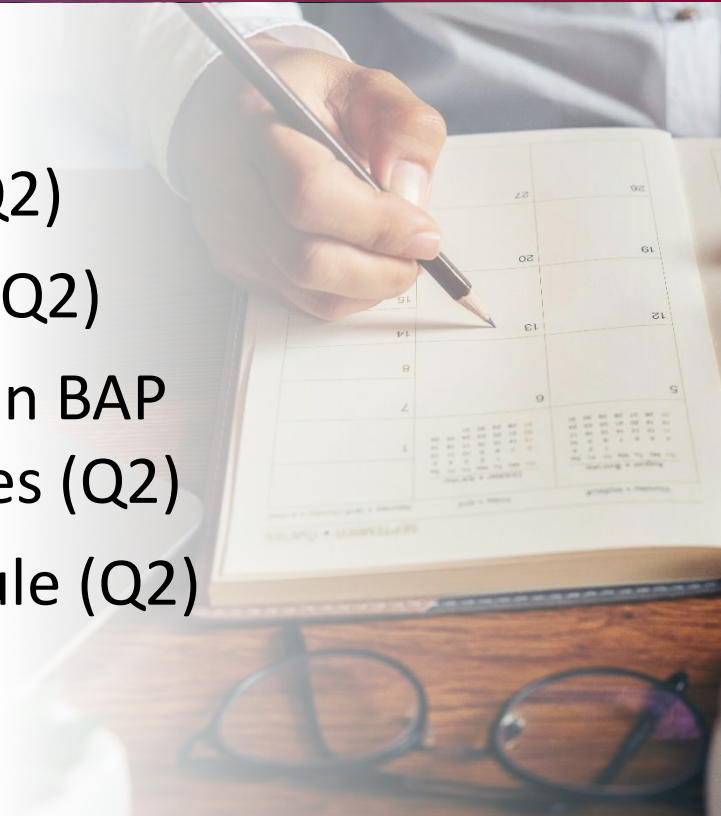


We want to hear from you!



Currently in the Works

- Age 26 Reporting and job aid (Q1)
- Via Benefits Reporting and job aid (Q2)
- Retiree Election Processing analysis (Q2)
- Create job aid around entering data in BAP for non-conference-controlled entities (Q2)
- Create and publish an invoice schedule (Q2)





HSA Year-End W-2 Reporting

Concern with Timing of Reports

- Initial improvement in 2021: quarterly “true-up” reports
- Continued timing concerns
- Next generation of improvement



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Policy Templates and Guidance

- **Disability Policy Template**
 - Policy template health benefits during disability
- **Via Benefits Plan Compliance**
 - Checklist to support plan sponsor compliance in developing HRA policy





Requiring Additional Analysis

- Optimal timing and processes for new hires/newly eligible enrollments
- Simplified reporting in Benefitsolver
- AE status report automation
- Self-Service for Via Benefits elections
- Assess usability of Payroll Report





HealthFlex User Group: Coming Soon

Formalizing Feedback

- Monitor pain-points and suggest/review proposed solutions
- Identify gaps (technology, processes, etc.)
- Serve as beta testers for new functionality
- Implementation: Q2
- **Please reach out to your CRM if you are interested**



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