

VBA + bswift

ACHIEVING YOUR GOALS, TOGETHER



Today's discussion

bswift Update

Roadmap

Q & A

Proven and flexible benefits administration solutions

The right blend of technology, expertise
and service excellence for even the most
complex benefits administration needs.



bswift acquired by Francisco Partners:

- Focus on healthcare technology
- Investments in bswift's technology capabilities
- Accelerate growth
- Allows bswift to operate as a stand-alone company

1,100

bswifters

18.7M

Total Lives with
44M logins in 2022

53

Channel Partners &
238 Direct Client
Employer Groups

98%

Client
Retention

93

Overall security
scorecard score
out of 100*

A+

BBB Rating

*As of 12/7/2022

bswift PRODUCT

ROADMAP



Reinventing the employee benefits experience



bswift's new digital experience

Developing a new home page design focused on increased personalization, engagement, third-party integration and mobile-first design. In addition to:

- Targeted Messaging to Provide Personalization
- Streamlined Navigation
- New Document Library
- New Online Total Compensation Statement Integration Capabilities
- Interactive Emma Chatbot & Search

The screenshot displays the bswift digital experience home page for user Brian Murphy. The page is personalized with the user's name and features a navigation bar with links for My Benefits, Learn, Enrollment Center, and a search icon. The main content area includes a greeting, a 'Good morning, Brian' message, and a prominent 'It's time to enroll' banner with a 'Visit the Enrollment Center' button. Below this is a row of quick actions: Submit Vaccination Information, Change HSA Elections, View Employee Discounts, Update Communication Preferences, Adjust My Contributions, and Birth, Marriage, or Other Life Events. A 'Your Info at a Glance' section shows key metrics: Your Next Paycheck on August 31 (in 3 Days), Annual Enrollment Closes in 4 Days (with a 'Visit the Enrollment Center' link), HSA Balance of \$834.17 (with a 'View HSA' link), and 401(k) Balance of \$29,093.56 (with a 'View 401(k)' link). A 'Total Rewards that transcend the traditional' section features a donut chart and a 'View Statement' button. The 'Suggested for You' section offers three targeted articles: 'Guidelines for Returning to the Office', 'Helping you Balance Work and Life', and 'Now's the time to make the change'. The 'Your Benefit Providers' section lists Aetna, CVS, MetLife, VSP, Fidelity, and ComputerShare. A search bar at the bottom asks 'Did you find what you're looking for?'. The footer contains a comprehensive navigation menu, social media icons, and a chat button.

Infused with AI

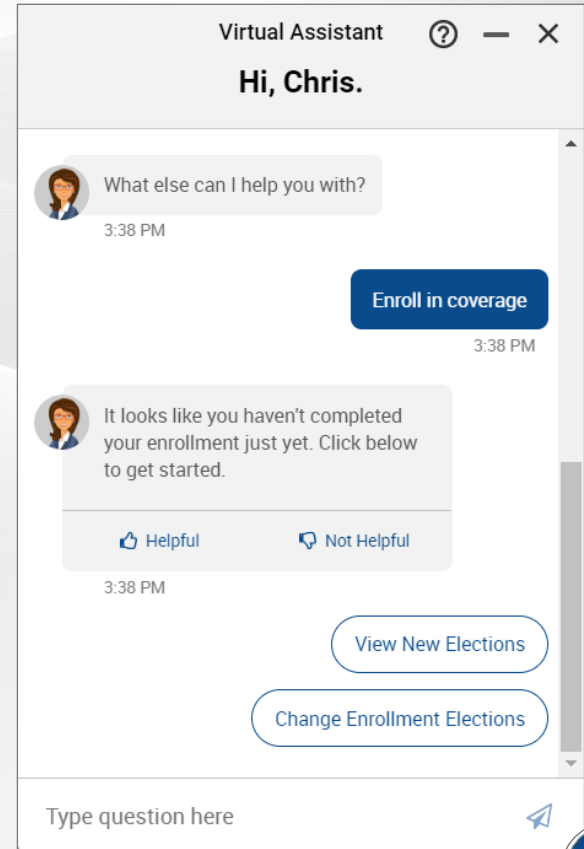
Chatbot and Advanced Search powered by AI using Natural Language Understanding (NLU) algorithm

Emma Virtual Assistant:

- Helps identify the intent behind the user's utterance and allows Emma to respond with the appropriate response.
- Each of the choice is driven by user eligibility and permission in bswift.
- These choices can navigate to various places in bswift core application, as well as return dynamic plan data to the user.

Library & Advanced Search:

- Integrated search feature backed by AI Natural Language Understanding (NLU).
- Ability to scan through library documents and FAQs to enhance the user experience in their search of key information.



Provider Search

Availability: Early 2024

bswift En Español Help Exit Enrollment

[Back to Benefits](#) **Health**

Who will be covered by this plan?
 Lukas Pleva (Employee) Sarah Pleva (Spouse) Baby Tester (Child) [Add Dependents](#)

Type the name of the doctor, specialty, or health care facility.
Erika Smith

[Show Filters](#)

My Providers
Erika Smith, MD
[View on Plans](#)

Location: Chicago, IL 60614

Smith, Erika, MD
Pediatrics
Chicago Pediatric Clinic
2540 N Lincoln Ave
Chicago, IL 60614
123-456-7890
[Selected](#)

Smith, Eric, MD
Neurology
Southwest Clinic
445 S Chestnut Rd
Chicago, IL 60614
456-267-5930
[Add to My Providers](#)

Smoll, Erica, MD
Radiologist
Valleyview Clinic
6189 E Pine St
Chicago, IL 60614
312-567-2946
[Add to My Providers](#)

Smithson, Erin, MD
OB/GYN
Southwest Clinic
445 S Chestnut RD
Chicago, IL 60614
456-267-5930
[Add to My Providers](#)

** UPDATE: Taken as an example**
We make reasonable effort to make sure the information displayed here is accurate, but use of this tool is for reference purposes only. From time to time doctors move in and out of networks, affecting the accuracy of the directory at any given moment, and we do not update the search tool in real time. In addition, there are hospitals and doctors who are not included in every plan. Please make sure that you search the proper network for the most accurate results.
You should contact the provider directly to confirm that they are in your plan network and that the desired service is covered by your plan. By signing in and using this tool you also agree to our Conditions of Use and Privacy Policy.

[Back to Benefits](#) [View on Plans](#)

[Privacy Policy](#) | [Browser Requirements](#) | [Technology powered by bswift](#)

Current Plan Comparison

CPC is a comparison tool in enrollment that will provide users the ability to compare their current enrollment data against future/selected plans

The screenshot displays the 'Enrollment' page with a progress indicator on the right showing four steps: 1. Your Info, 2. Your Benefits, 3. Enroll, and 4. Complete. The main content area is titled 'Medical' and compares two plans side-by-side.

Current Plan	Selected Plan (beginning Jan 1, 2023)
YOUR COST PER PAY PERIOD \$187.00	YOUR COST PER PAY PERIOD \$152.95
PLAN: Bronze Plan A / Aetna	PLAN: Broad Network / Aetna
COVERAGE: Employee + Child	COVERAGE: Employee + Family
Jane Smith (Employee) ✔ Covered	Jane Smith (Employee) ✔ Covered
Jon Smith (Spouse) ⚠ Ineligible	Jon Smith (Spouse) ✔ Covered
Emily Smith (Child) ✔ Covered	Emily Smith (Child) ✔ Covered
Effective Date: 01/01/2022	Effective Date: 01/01/2023
Deductible: \$4,000.00	Deductible: \$2,000.00
Out-of-Pocket Maximum: \$6,000.00	Out-of-Pocket Maximum: \$4,000.00
Copay: \$25.00	Copay: \$25.00
	✔ Completed Edit Selection

On the right side, there is a 'Your Cost per pay period' box showing \$152.95. Below it, a message asks if the user is finished selecting benefits and provides a 'Continue' button. At the bottom right, there is a 'Save and Finish Later' button.

Dependent Verification

The DV Audit Module is a tool that will display attributes of documents required for verification. Based on the document received, and the attributes required, the auditor may approve or reject coverage.

Dependent Verification Status

④ Test Tester 12

Update Pending Status

Test Tester 12 Employee - 1/1/1980 <input type="radio"/> Not Selected	Spouse Tester 12 Spouse - 6/1/1980 <input type="radio"/> Not Selected	Child Tester 12A Child - 1/1/2013 <input checked="" type="radio"/> Pending Review <input type="radio"/> Not Selected	Child Tester 12B Child - 1/1/2014 <input checked="" type="radio"/> Pending Review <input checked="" type="radio"/> Selected
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Dependent Information

Date of Birth: 1/1/2014

User ID: 30117762

Relationship: Child

Audit Date from: 9/17/2022 to 10/2/2022

Grace Period Date: 10/12/2022

Enroll Type: Open Enrollment

Verification Status: Unverified

Verification Date: mm/dd/yyyy

Required Documents

Birth Certificate OR Adoption Certificate

Save

Dependents will display as pending review, based on the documentation received and pre-configured system rules.

Dependent Information, Required Documents, and an Audit Checklist (Audited Documents) will appear.

Audited Documents

Required Document: Birth Certificate

- Birth Certificate
- Name of employee and/or verified spouse/domestic partner
- Name of dependent
- Legible
- Issued by government agency
- English or notarized translated copy provided
- Date of birth

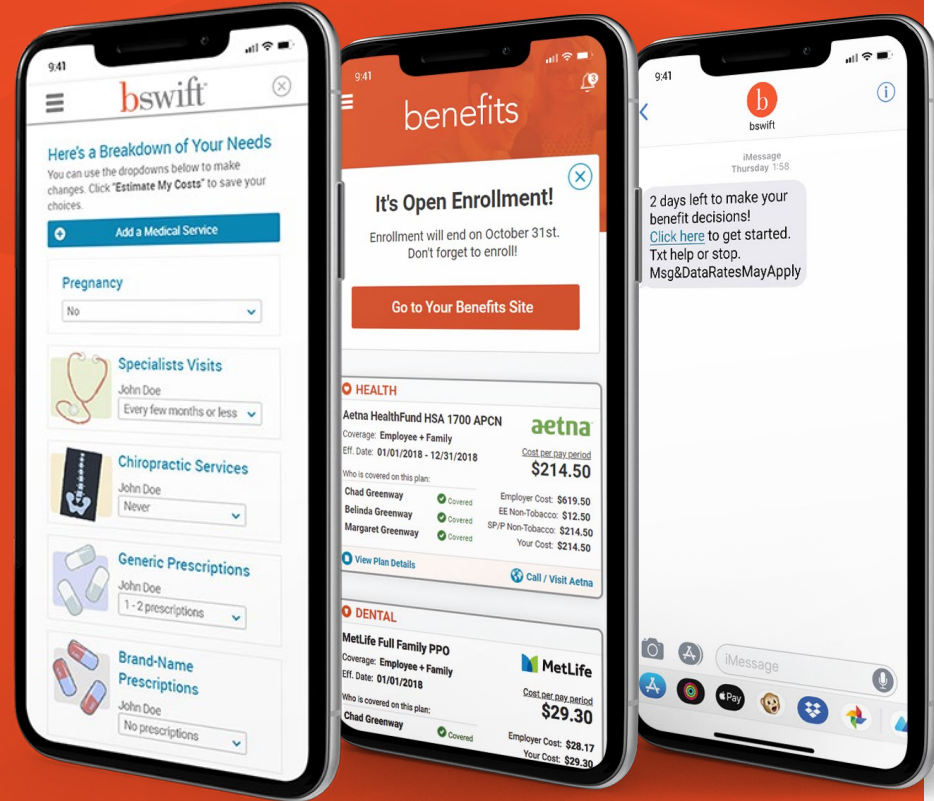
Required Document: Adoption Certificate

- Adoption Certificate
- Signature of clerk/judge
- Name of employee and/or verified spouse/domestic partner
- Name of dependent
- Legible
- English or notarized translated copy provided
- Date of birth
- Date of adoption/placement

bswift mobile solutions

bswift is the hub for benefits. With bswift's mobile solutions, employees always have easy access to their benefits information, helping them make smart and timely health care decisions on-the-go.

- Mobile-first responsive design bswift platform
- SMS text messages from bswift reporting suite
- **New bswift Benefits App – August!**
 - Streamlined account access
 - Biometric authentication
 - In-App alerts
 - Push notifications – 2024



In the lab for 2023 and beyond

A few of the high impact deliverables being considered for future releases.

- In-line guided assistance to simplify more complex and error-prone processes
- Expansion of integrated employee engagement and communications capabilities across all channels
- Integration of ChatGPT-style generative AI into our employee, customer care and administrator experience
- New quality and transparency tools to help people make better choices around care decisions
- New pluggable enrollment experiences tailored to different audiences
- Expanded and redesigned Emma decision support capabilities inside and outside of the enrollment experience

Questions

bswift[®]

**THANK YOU
FOR
YOUR TIME**

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