VBA + bswift

# ACHIEVING YOUR GOALS, TOGETHER

# Today's discussion

bswift Update

Roadmap

Q & A

**b**swift

## 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

bswift PRODUCT

# ROADMAP

# Reinventing the employee benefits experience

**Mobile Priority**

**Expanded Decision Support**

**Efficient Data Transfer**

# Enrollment and user experience

**Clean Modern Design & Introduction of AI**

**Operational Improvement**

# 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
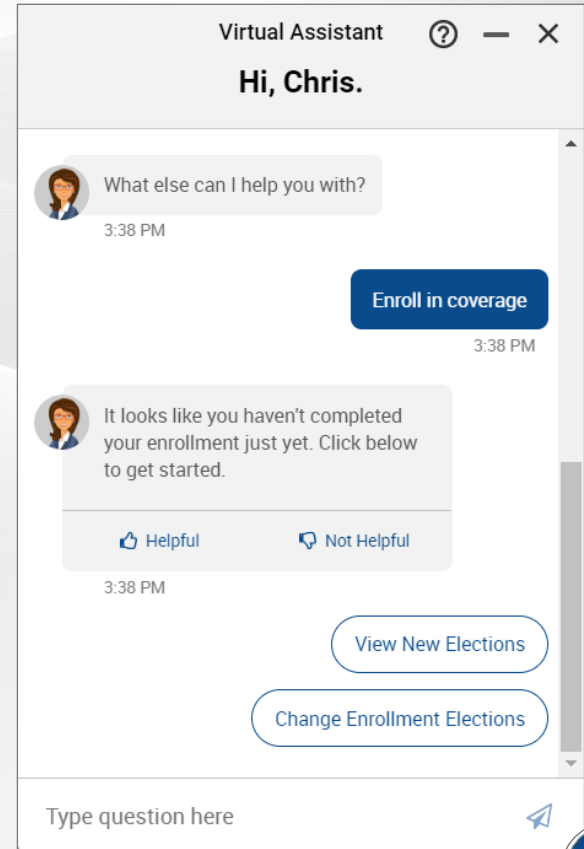
bswift

# 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

# 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

# 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.



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# 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.

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- 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
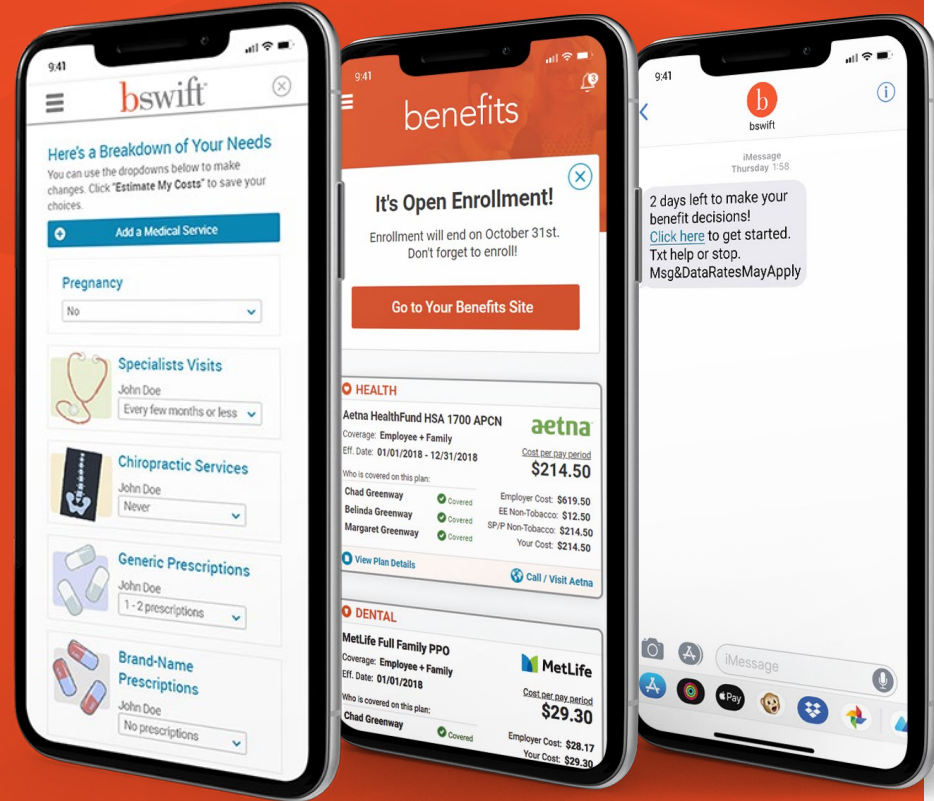
# In the lab for 2023 and beyond

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

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# THANK YOU FOR YOUR TIME