



Overview of Benefits Insights Dashboard & Member Surveys

Data to Support Benefits Strategies

Updated November 2025



Contents

- Overview of Benefits Insights Dashboard 3
 - Feature Overview 3
 - Benefits Insights Dashboard3
 - Admin View and Access 3
 - Dashboard Menu Options 4
 - Breakdown of Each Dashboard 4
 - Benefits Participation and Premium Costs Analytics4
 - Service Center Trends and Performance 15
 - Mobile (App) Analytics 24
 - Campaign Analytics 27
 - Enrollment Survey Dashboard 33
 - Benefits Literacy Survey Dashboard 34
 - Benefits Preference Survey Dashboard 35
- Member Surveys 36
 - Breakdown of Each Survey..... 36
 - Enrollment Survey 36
 - Benefits Literacy Survey..... 38
 - Benefits Program Survey 40





Overview of Benefits Insights Dashboard

Feature Overview

Benefits Insights Dashboard

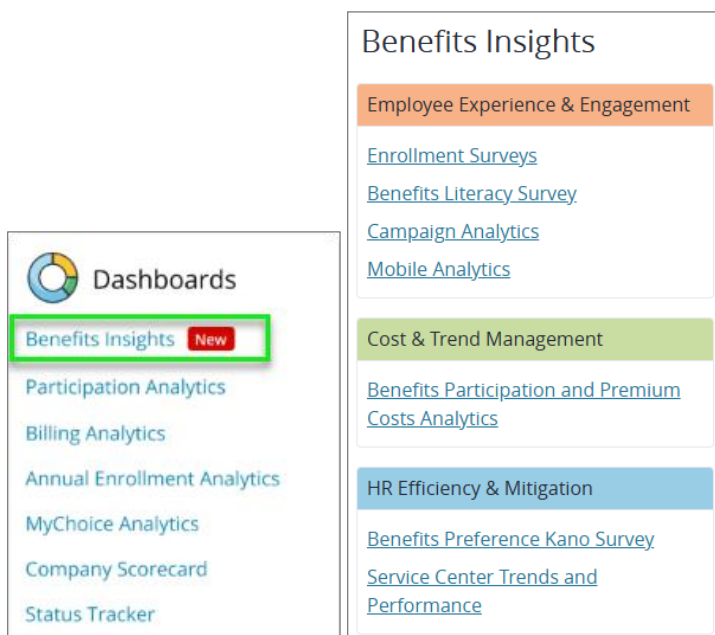
The Benefits Insights Dashboard is an insight and analytics dashboard that provides clients with impactful data around how their employees/members are leveraging Businessolver's technology and services. This is data that can be directly tied to the outcomes of BSC's technology and how our partnership is delivering on clients' benefits strategies.

Important Elements of Benefits Insights Dashboard

- Dashboards are available for the following:
 - Service Center Trends and Performance
 - Mobile App Analytics
 - Campaign Analytics (only for Consumer Experience clients)
 - Benefits Participation and Premium Costs Analytics
 - Member Surveys – enrollment, benefits literacy, and benefits preference surveys
- Users can filter and adjust visual representations of the data.
- Users can export data to CSV or Excel.

Admin View and Access

- When enabled, the **Dashboards** (Reports) widget will display a "Benefits Insights" link to client admins on the Admin Home page.

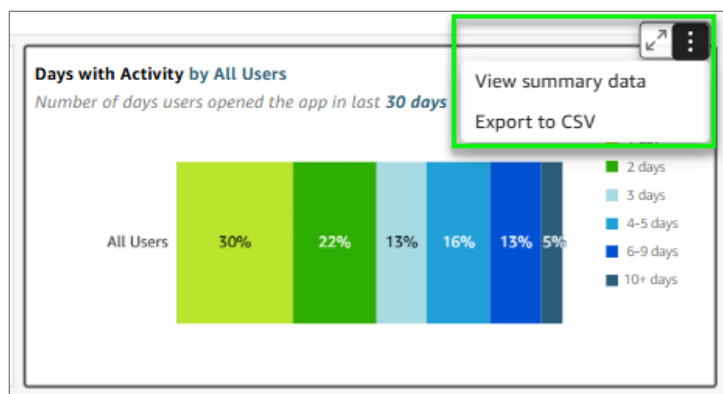




- The data shown within the Benefits Insights Dashboard cannot be restricted to specific structures. This means multi-divisional clients (or clients with many admins) would see all data within that client.
- If you are a client with many admins who should not have access, consider working with your client team to add a second reporting widget to the Admin Home page with visibility restrictions to meet your needs.
- Admins will see each dashboard represented on the left side of the page. Click to view a dashboard.

Dashboard Menu Options

Hovering over a tile on a dashboard yields additional options in its top right corner. These include the ability to adjust the view of the data, export, and more.



- **Maximize Icon:** Expand and view a larger version of the chart/table/graph (not available on all dashboards).
- **Sort Visual:** Sort how data is presented on a chart/table/graph (not available for all visuals).
- More Options Icon
 - **View Summary Data:** Shows a table of the data that mirrors how it looks when exported to CSV or Excel.
 - **Export to CSV:** Generates and downloads a CSV file containing the data represented in the chart/table/graph.
 - **Export to Excel:** Generates and downloads an Excel workbook containing the data represented in the chart/table/graph. The Excel file retains formatting from the dashboard, unlike CSV.
 - **Reset:** Reset a filter to its default setting.
 - **Refresh:** Refresh the options within a drop-down for filtering.

Breakdown of Each Dashboard

Benefits Participation and Premium Costs Analytics

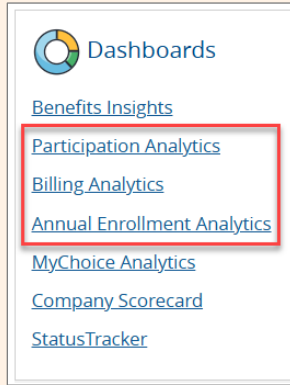
The Benefits Participation and Premium Costs Analytics Dashboard provides a unified analytics experience that brings Enrollment Participation, AE analysis, and Billing Analytics into one clear, consistent, and reliable view.





Note

The new dashboard and tabs within leverage similar data as the legacy options on the Reports Widget for Participation, Billing, and Annual Enrollment Analytics, but provide a better user experience. **Of note, the historical data represented in the legacy analytics (such as Participation Analytics) will NOT transfer to this new experience. All data in the Benefits Participation and Premium Costs Analytics dashboard will go back to November 6, 2025.**



Additionally:

- The dashboard intelligently recognizes and maintains continuity when plan numbers change but plan names remain the same.
- Replacement plans are tracked seamlessly so users can follow a plan's lifecycle and enrollment trends without stitching data together.
- The dashboard provides powerful year-over-year insights. Users can instantly see:
 - Enrollment and waived patterns year over year—who stayed enrolled, who newly enrolled, who waived both years, and who moved from enrolled to waived (or vice versa).
 - Plan migration behavior—answers to “What plan were you in for 2025, and where did you go for 2026?” across populations, with clear mappings such as PPO to PPO or PPO to HDHP.





The dashboard contains five tabs:

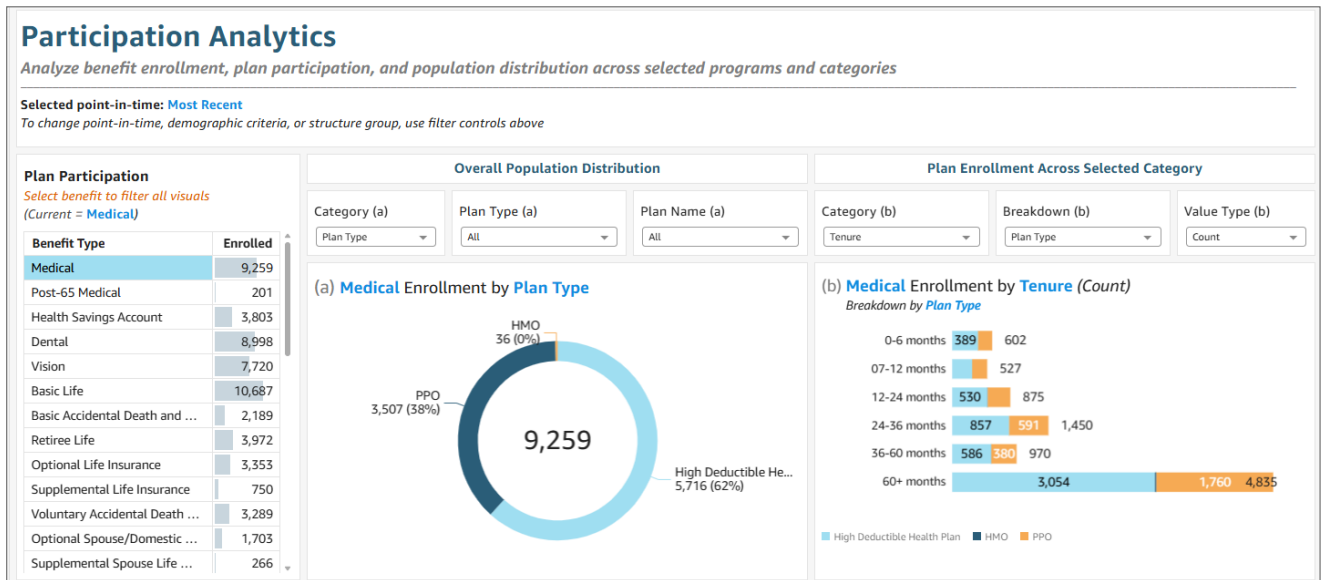
Benefit Participation Tab

Presents plan participation data, including enrollment counts across plan types, plan names, demographic attributes, and more.

- Controls (Filters):**

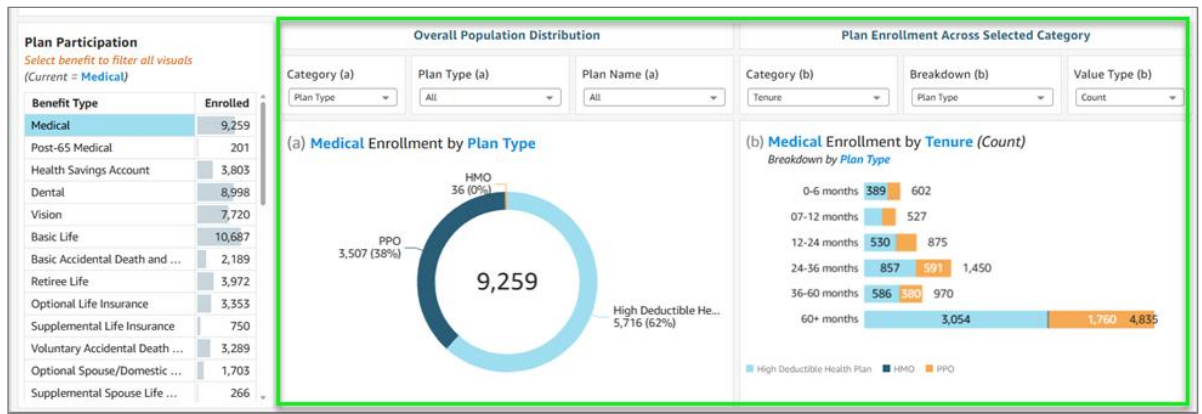
- **Point-In-Time:** Select and view data for a past date (data only goes back as far as 11/06/2025).
- **Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
- **Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- **Tenure:** Length of employment.
- **Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.

- Participation Analytics**



- **Plan Participation:** Shows selectable benefit types (subgroups) with total enrollment counts. Select a Benefit Type to view its data on the “Overall Population Distribution” and “Plan Enrollment Across Selected Category” charts.
- **Overall Population Distribution and Plan Enrollment Across Selected Category:** Shows enrollment counts/percentages by selected Benefit Type and Category. Filters for Plan Type and Plan Name allow further slicing of the data.





- Table Export:** Table of summarized data from this dashboard that can be exported to CSV or Excel format for analysis. Filter by Benefit Type, Plan Type, and/or Plan Name as desired before exporting.

Table Export
Exportable 'Participation Analytics' summary table

Benefit Type: All, Plan Type: All, Plan Name: All

Benefits Participation Data Export
Use the three vertical dots "menu options" button (⋮) found in the top right corner of this table to export data

Point-in-Time	Benefit Type	Plan Type	Plan Name	Tier/Coverage Level	Employment Status	Generation	Tenure	Structure Group	Enrolled
Nov 23, 2025	Medical	High Deductibl...	Aetna Horizon ...	Employee Only	Full-time	Baby Boomers	07-12 months	Businessolver Inc :: DEMO :: Remote :: Exempt-Eligible	7
Nov 23, 2025	Medical	High Deductibl...	Aetna Horizon ...	Employee Only	Full-time	Baby Boomers	07-12 months	Businessolver Inc :: DEMO :: Remote :: NonExempt-Eligible	2
Nov 23, 2025	Medical	High Deductibl...	Aetna Horizon ...	Employee Only	Full-time	Baby Boomers	12-24 months	Businessolver Inc :: DEMO :: Remote :: NonExempt-Eligible	1

Export to CSV, Export to Excel

View: 100 items, 1 of 19

Premium Costs

Provides premium cost data, including costs by benefit type, plan, coverage level, vendor, and over time. This data is pulled in a similar fashion to Billing Analytics on the Reports Widget, sourced from the same data used in the Billing Invoice Document Center finalized invoices, with new visualizations with more impactful filter capabilities.

Benefit Participation | **Premium Costs** | Plan Movement (AE) | Transaction Status (AE) | Point-in-Time

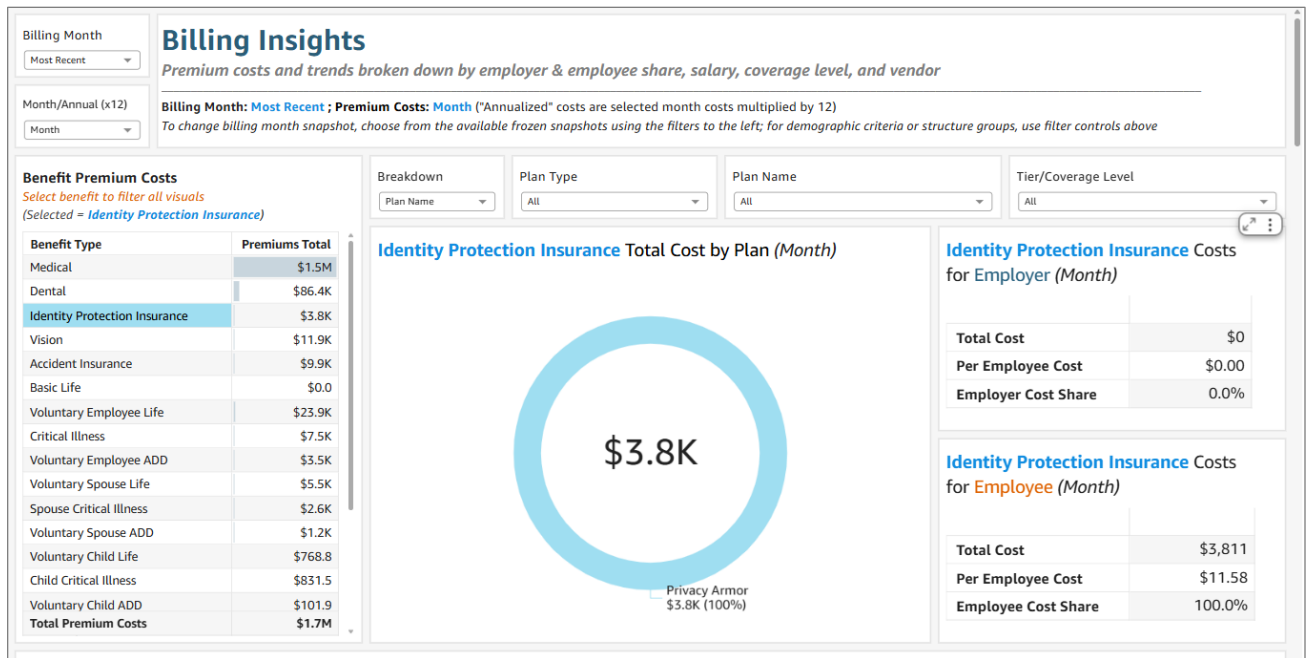
Controls

Billing Profile: All, Employment Status: All, Generation: All, Tenure: All

Division: All, Subdivision: All, Class: All, Status: All

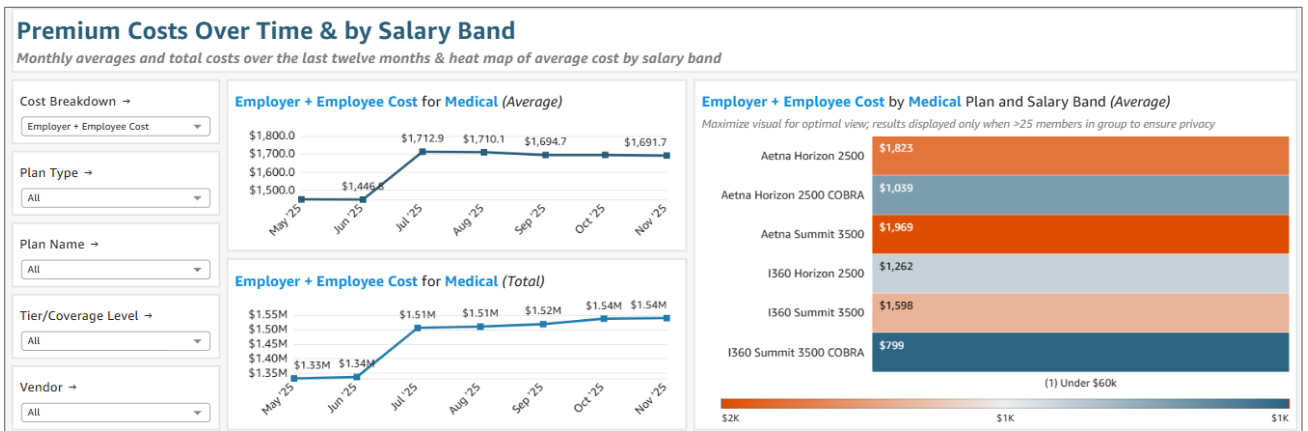
- Controls (Filters):**
 - Billing Profile:** Filter on a specific Billing Profile.
 - Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
 - Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
 - Tenure:** Length of employment.
 - Division, Subdivision, Class, Status:** Groups that members belong to in Businessolver, which make up Structure Groups.
- Billing Insights**



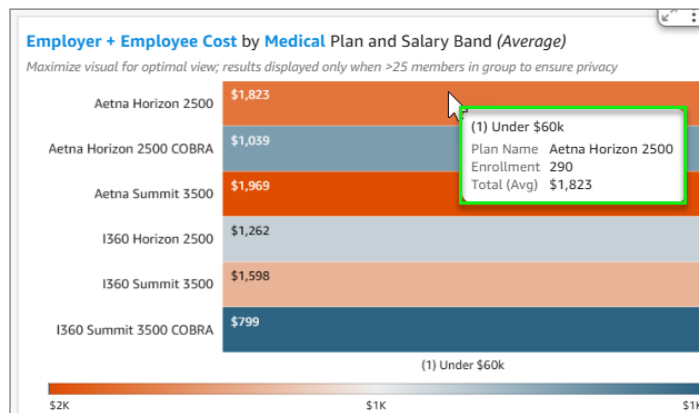


- **Billing Month:** Filter data by the first of a specific month within a specific year.
- **Month/Annual (x12):** Switch between viewing monthly or annualized costs.
- **Benefit Premium Costs:** Select certain Benefit Types (subgroups) and see total premium costs for each.
- **Breakdown:** Switch between viewing Plan Type or Plan Name on the "[Benefit Type] Total Cost by Plan" chart.
- **Plan Type:** Filter on plan types within the chosen Benefit Type.
- **Plan Name:** Filter specific plans within the Plan Type.
- **Tier/Coverage Level:** Filter by coverage level (e.g., employee only, family, etc.)
- **[Benefit Type] Total Cost by Plan:** View dollar amounts and percentages of premium costs within the Benefit Type (datapoints change based on filters).
- **[Benefit Type] Costs for Employer:** Dollar amounts and cost share percentages of Benefit Type premium costs for the employer.
- **[Benefit Type] Costs for Employee:** Dollar amounts and cost share percentages of Benefit Type premium costs for the employee.
- **Premium Costs Over Time & by Salary Band:** For the selected Benefit Type, filter and view how premium costs change over time as well as a heat map of average premium costs by salary band.





- **Cost Breakdown:** Choose to view Employer + Employee Cost, or one or the other.
- **Plan Type:** Filter on plan types within the chosen Benefit Type.
- **Plan Name:** Filter specific plans within the Plan Type.
- **Tier/Coverage Level:** Filter by coverage level (e.g., employee only, family, etc.)
- **Vendor:** Filter by specific vendor(s).
- **[Cost Breakdown] for [Benefit Type] (Average):** Line chart showing how average premium costs have changed month over month.
- **[Cost Breakdown] for [Benefit Type] (Total):** Line chart showing how total premium costs have changed month over month.
- **[Cost Breakdown] by [Benefit Type] Plan and Salary Band (Average):** Chart showing the average premium costs for each plan based on salary. Hover over the bars on the chart for more details.



- **Premium Costs by Coverage/Tier & Vendor:** For the selected Benefit Type, filter, view, and export premium costs broken down by coverage/tier and vendor name.





Premium Costs by Coverage/Tier & Vendor

Premium costs broken down by coverage/tier & vendor name

Premium Summary by Coverage/Tier

Tier/Coverage Level (Grouped): All | Plan Type: All | Plan Name: All

Medical PEPY Premiums by Tier/Coverage Level (Month)
Use [*] to expand table to original coverage level details

Tier/Coverage Level (Grouped)	Enrollment	Employer Cost	Employee Cost	Total Cost	Employer Share
Employee Only	622	\$971.54	\$196.87	\$1,168.41	83.1%
Employee and Children	260	\$1,652.88	\$359.09	\$2,039.66	81.0%
Employee and Domestic Partner	9	\$1,326.95	\$132.97	\$1,649.28	80.5%
Employee and Spouse	74	\$1,451.95	\$407.76	\$1,859.73	78.1%
Family	166	\$2,437.95	\$465.99	\$2,913.25	83.7%
Total	1,131	\$1,392.20	\$290.33	\$1,691.65	82.3%

Premium Summary by Vendor

Billing Profile: All | Parent Vendor: All | Vendor: All

Premium Costs Medical Vendor Summary
Use "menu options" button in top right corner of table for exporting data

Vendor	Benefit Type	Enrollment	Employer Cost	Employee Cost	Total Cost	Employer Share
Imagine 360	Medical	533	\$529,514.73	\$100,607.56	\$637,121.74	83.1%
Aetna	Medical	598	\$737,385.76	\$163,597.22	\$902,282.71	81.7%
Total		1,131	\$1,266,900.49	\$264,204.78	\$1,539,404.45	82.3%

- **Premium Summary by Coverage/Tier:** View employee/employer premium costs Per Employee Per Year (PEPY) and filter by tier/Coverage Level, Plan Type, and/or Plan Name.
- **Premium Summary by Vendor:** View employee/employer premium costs by vendor and filter by Billing Profile, Parent Vendor, and Vendor.
- **Table Export:** Table of summarized data from this dashboard that can be exported to CSV or Excel format for analysis. Filter by Benefit Type, Plan Type, and/or Plan Name as desired before exporting.

Table Export

Exportable 'Billing Insights' summary table

Benefit Type: All

Plan Type: All

Plan Name: All

Premium Costs Data Export

Use the three vertical dots "menu options" button (⋮) found in the top right corner of this table to export data

Month	Benefit Type	Vendor	Plan Type	Plan Name	Tier/ Coverage Level	Employment Status	Generation	Tenure	Structure Group	Enrollment	Employer Premium (Sum)	Employee Premium (Sum)
Nov 2025	Accident...	Voya	Cancer 1	Compass ...	Employee Only	Full-time	Baby Boomers	0-6 ...	Businessolver Inc :: DEMO :: Remote :: NonExempt-Eligible	1	\$0.00	\$13.5...
Nov 2025	Accident...	Voya	Cancer 1	Compass ...	Employee Only	Full-time	Baby Boomers	07-12 ...	Businessolver Inc :: DEMO :: Remote :: Exempt-Eligible	2	\$0.00	\$27.0...
Nov 2025	Accident...	Voya	Cancer 1	Compass ...	Employee Only	Full-time	Baby Boomers	07-12 ...	Businessolver Inc :: DEMO :: Remote :: NonExempt-Eligible	2	\$0.00	\$27.0...

View: 100 items | << 1 of 20 >>

Plan Movement (AE) Tab

See how members are changing plan elections during Annual Enrollment (current and future plans).

- **Controls (Filters)**

Participation | Billing | **AE Plan Movement** | AE Status | Point-in-time

Controls

Point-In-Time: Most Recent | Benefit Type: Medical | Employment Status: All | Generation: All | Tenure: All

Division: All | Subdivision: All | Class: All | Status: All

- **Point-In-Time:** Select and view data for a past date (data only goes back as far as 11/06/2025).
- **Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
- **Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- **Tenure:** Length of employment.





- **Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.
- **Annual Enrollment Plan Movement**

Annual Enrollment Plan Movement

Track plan elections during annual enrollment periods

Selected point-in-time: **Yesterday**
To change point-in-time, demographic criteria, or structure group, use filter controls above

Current to Future Elections
Select benefit to filter all visuals (Selected = Medical)
**Expected enrollment with remaining current elections continuing*

Benefit Type	Current Enrolled	Future Enrolled*	Joining	Leaving	Net Enroll	Delta Enrolled
Medical	1,124	1,124	0	0	0	0.0%
Health Savings Account	1,075	1,075	0	0	0	0.0%
Dental	1,230	1,230	0	0	0	0.0%
Identity Protection ...	354	354	0	0	0	0.0%
Vision	1,020	1,020	0	0	0	0.0%
Accident Insurance	436	436	0	0	0	0.0%
Basic Life	1,483	1,483	0	0	0	0.0%
Voluntary Employee Life	824	824	0	0	0	0.0%
Critical Illness	408	408	0	0	0	0.0%
Voluntary Employee ADD	525	525	0	0	0	0.0%

Plan Movement Category: All | Current Plan Name: All | Future Plan Name: All

Medical Future Election Plan Movement

Use [+] and [-] buttons to expand and collapse table columns

Plan Movement Category	Future Plan	Current Plan	Employees
<input type="checkbox"/> Enrolled → No Future Election	<input type="checkbox"/> No Future Election	Aetna Horizon 2500	293
		Aetna Horizon 2500 COBRA	1
		Aetna Summit 3500	300
		I360 Horizon 2500	184
		I360 Summit 3500	344
		I360 Summit 3500 COBRA	

- **Current to Future Elections:** Select and view current and future numbers for specific Benefit Types.
- **[Benefit Type] Future Election Plan Movement:** View the plans that members are electing for the future. Filter by plan movement category, current plan name, and future plan name.
- **Enrollment Flow: Current Plan to Future Election:** View a Sankey diagram to see the distribution and volume of member enrollment to future election across plans.

Enrollment Flow: Current Plan to Future Election

Sankey diagram visualizing the distribution and volume of member enrollment to future election across plans

Plan Name/Type: Plan Type | Minimum: 20

Current Plan Type: All | Current Plan Name: All | Future Plan Type: All | Future Plan Name: All

Medical Current Enrollment to Future Elections by Plan Type

View summary data or export to CSV by using the three vertical dots "menu options" button (⋮)

The Sankey diagram shows a flow from 'High Deductible Health Plan' (left) to 'No Future Election' (right). The flow is represented by a blue bar on the left and a teal bar on the right, connected by a grey bar in the middle.

- Filter by Plan Name/Plan Type, Current and Future Plan Name/Type, and Minimum enrollment counts to adjust the **[Benefit Type] Current Enrollment to Future Elections by [Plan Name/Plan Type]** graph.
- **Table Export:** Table of summarized data from this dashboard that can be exported to CSV or Excel format for analysis. Filter by Benefit Type, Current Plan Name, and/or Future Plan Name as desired before exporting.





Table Export
Exportable 'Plan Movement' summary table

Benefit Type: All

Current Plan Name: All

Future Plan Name: All

Current & Future Participation Data Export
Use the three vertical dots "menu options" button (⋮) found in the top right corner of this table to export data

Benefit Type	Current Plan Type	Current Plan Name	Current Tier/Coverage Level	Future Plan Type	Future Plan Name	Future Tier/Coverage Level	Employment Status	Generation	Tenure	Structure Group	Employees
Medical	High ...	Aetna Horizo...	Employee Only	No Futur...	No Future ...	null	Full-time	Generatio...	0-6 ...	Businessolver Inc :: DEMO :: Remote :: Exempt-Eligible	5
Medical	High ...	Aetna Horizo...	Employee Only	No Futur...	No Future ...	null	Full-time	Generatio...	0-6 ...	Businessolver Inc :: DEMO :: Remote :: NonExempt-...	4
Medical	High ...	Aetna Horizo...	Employee Only	No Futur...	No Future ...	null	Full-time	Generatio...	07-12...	Businessolver Inc :: DEMO :: Remote :: Exempt-Eligible	8

View: 100 items | << < 1 of 33 > >>

Transaction Status (AE) Tab

Provides data on Annual Enrollment transaction statuses (Not Started, In Progress, Approved, etc.). This is similar to the reporting available today via the AE Analytics Dashboard on the Reports Widget.

- Controls (Filters)**

Benefit Participation | Premium Costs | Plan Movement (AE) | **Transaction Status (AE)** | Point-in-Time

Controls

Employment Status: All

Generation: All

Tenure: All

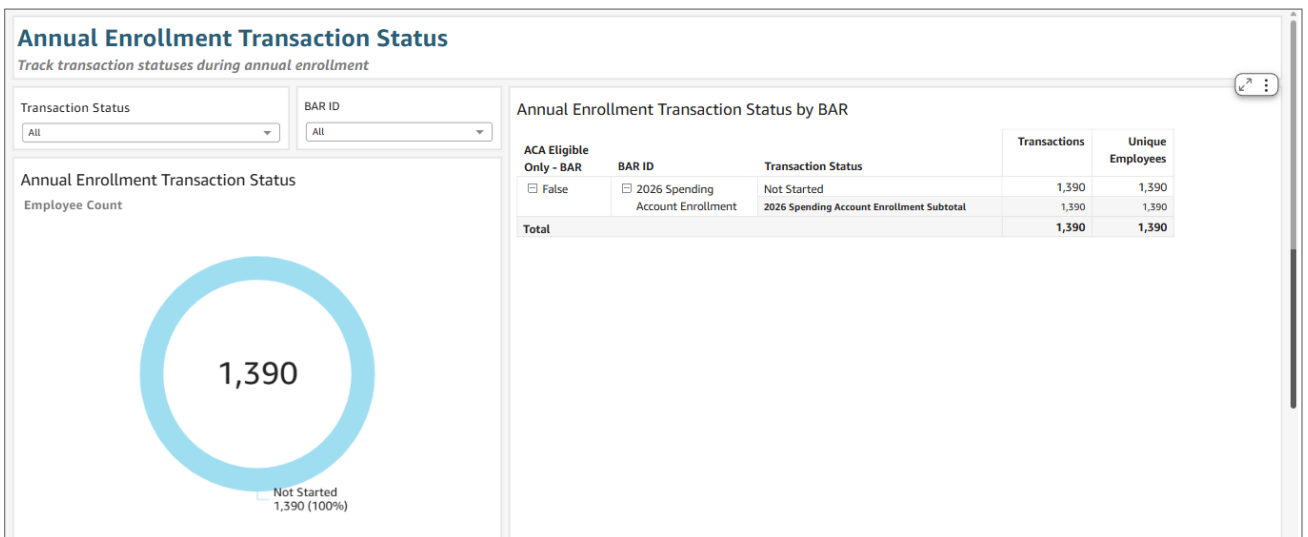
Division: All

Subdivision: All

Class: All

Status: All

- Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
- Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- Tenure:** Length of employment.
- Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.
- Annual Enrollment Transaction Status:** Filter by transaction status and BAR and view counts of total transactions and unique employees who used the BAR.



- Table Export:** Table of summarized data from this dashboard that can be exported to CSV or Excel format for analysis.





Table Export
Exportable 'Transaction Status' summary table

Transaction Status Data Export by Member
Use the three vertical dots "menu options" button (⋮) found in the top right corner of this table to export data

Member Number	BAR ID	Transaction Status	ACA Eligible	Employment Status	Generation	Tenure	Structure Group	Transaction s
3417258	2026 Spending Account Enrollment	Not Started	Not ACA Eligible	Full-time	Generation X	60+ months	Businessolver Inc :: BSC :: Remote :: Exempt-Eligible	1
3417264	2026 Spending Account Enrollment	Not Started	Not ACA Eligible	Full-time	Generation X	60+ months	Businessolver Inc :: BSC :: Remote :: Exempt-Eligible	1
3417273	2026 Spending Account Enrollment	Not Started	Not ACA Eligible	Retired	Generation X	60+ months	Businessolver Inc :: BSC :: Remote :: Emeriti	1

View: 100 items << >> 1 of 14 >>>

Export to CSV
Export to Excel

Point-in-Time Tab

Compare enrollment and waive numbers for two points in time. This tab is especially valuable for understanding how participation shifts month-over-month and year-over-year.

Note Data only goes back to 11/06/25.

- Each month, the system captures a snapshot of current enrollment across all plans, creating a continuous record for future comparisons.
- As a result, admins can easily compare today's enrollment to a prior monthly snapshot—for example, on October 22, 2026, an admin will be able to review changes relative to the snapshot taken on March 1, 2026.
- **Controls (Filters)**

Benefit Participation | Premium Costs | Plan Movement (AE) | Transaction Status (AE) | **Point-in-Time**

Controls

Point-In-Time: Yesterday
 Employment Status: All
 Generation: All
 Tenure: All

Division: All
 Subdivision: All
 Class: All
 Status: All

- **Point-In-Time:** Select and view data for a past date (data only goes back as far as 11/06/2025).
- **Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
- **Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- **Tenure:** Length of employment.
- **Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.
- **Point-in-Time Comparisons**





Benefit Participation | Premium Costs | Plan Movement (AE) | Transaction Status (AE) | **Point-in-Time**

Controls Point-In-Time Yesterday Employment Status All Generation All Tenure All Division All Subdivision All Class All Status All

Point A 2025-11-06

Point B Yesterday

Point-in-Time Comparisons

Compare benefit enrollments and waives between two points in time

Starting point-in-time (A): 2025-11-06 ; Ending point-in-time (B): Yesterday
 To change point-in-time snapshots, choose from the available frozen snapshots using the filters to the left; for demographic criteria or structure groups, use filter controls above

Enrollment and Waives: 2025-11-06 vs Yesterday
 Select benefit to filter all visuals (Selected = Medical)

Benefit Type	Enrolled (2025-11-06)	Enrolled (Yesterday)	Delta Enrolled	Waived (2025-11-06)	Waived (Yesterday)	Delta Waived
Medical	1,126	1,124	↓ -0.2%	191	196	↑ 2.6%
Health Savings Account	1,074	1,075	↑ 0.1%	64	64	→ 0.0%
Dental	1,230	1,230	→ 0.0%	170	173	↑ 1.8%
Identity Protection ...	350	354	↑ 1.1%	990	993	↑ 0.3%
Vision	1,020	1,020	→ 0.0%	330	334	↑ 1.2%
Accident Insurance	433	436	↑ 0.7%	894	898	↑ 0.4%
Basic Life	1,468	1,483	↑ 1.0%	0	0	→ 0.0%
Voluntary Employee Life	820	824	↑ 0.5%	584	586	↑ 0.3%

Plan Name/Plan Type: Plan Type | Point A Minimum Count: 10 | Point B Minimum Count: 10

Medical Enrollment by Plan Type: 2025-11-06 vs Yesterday

Name/Type	Enrolled (2025-11-06)	Enrolled (Yesterday)	Delta Enrolled
High Deductible Health Plan	1,126	1,124	↓ -0.18%
Total	1,126	1,124	-0.18%

- **Point A and Point B:** Select the two points in time to compare.
- **Enrollment and Waives:** View enrolled and waived numbers for specific Benefit Types for both selected dates.
- **[Benefit Type] Enrollment by [Plan Name/Plan Type]:** View more specific data for a selected Benefit Type by Plan Type or Plan Name. Set minimum enrollment counts for Point A and Point B.
- **Table Export:** Table of summarized data from this dashboard that can be exported to CSV or Excel format for analysis. Filter by Benefit Type, Plan Type, and/or Plan Name as desired before exporting.

Table Export
 Exportable 'Point-in-Time' summary table

Benefit Type: All | Plan Type: All | Plan Name: All

Point-in-time Data Export: 2025-11-06 vs Yesterday
 Use the three vertical dots "menu options" button (⋮) found in the top right corner of this table to export data

Benefit Type	Plan Type	Plan Name	Tier/Coverage Level	Employment Status	Generation	Tenure	Structure Group	Enrolled (2025-11-06)	Waived (2025-11-06)	Enrolled (Yesterday)	Waived (Yesterday)
Medical	High ...	Aetna Horizo...	Employee Only	Full-time	Millennials	07-12...	Businessolver Inc :: DEMO :: Remote :: NonExempt-Eligible	4	0	4	0
Medical	High ...	Aetna Horizo...	Employee Only	Full-time	Millennials	12-24...	Businessolver Inc :: DEMO :: Remote :: Exempt-Eligible	12	0	12	0
Medical	High ...	Aetna Horizo...	Employee Only	Full-time	Millennials	12-24...	Businessolver Inc :: DEMO :: Remote :: NonExempt-Eligible	1	0	1	0

View: 100 Items | 1 of 35

Export to CSV | Export to Excel





Service Center Trends and Performance

The Service Center Trends and Performance Dashboard provides client admins with helpful data to identify trends in Service Center call interactions between members and Member Advocates. Data refreshes overnight daily.

The Service Center Trends and Performance Dashboard is available for clients with any level of Service Center contracted.

Controls (Filters)

At the top of the page, users can filter the data to target specific details.

Controls					
Start Date <input type="text" value="2025/01/01"/>	End Date <input type="text" value="2025/02/11"/>	Employment Status <input type="text" value="All"/>	Generation <input type="text" value="All"/>	Tenure <input type="text" value="All"/>	
Division <input type="text" value="All"/>	Subdivision <input type="text" value="All"/>	Class <input type="text" value="All"/>	Status <input type="text" value="All"/>		
AI Topic Tag <input type="text" value="All"/>	Call Overall Sentiment <input type="text" value="All"/>	Anger Present <input type="text" value="All"/>	Sentiment Improved <input type="text" value="All"/>	Repeat Caller Flag <input type="text" value="All"/>	

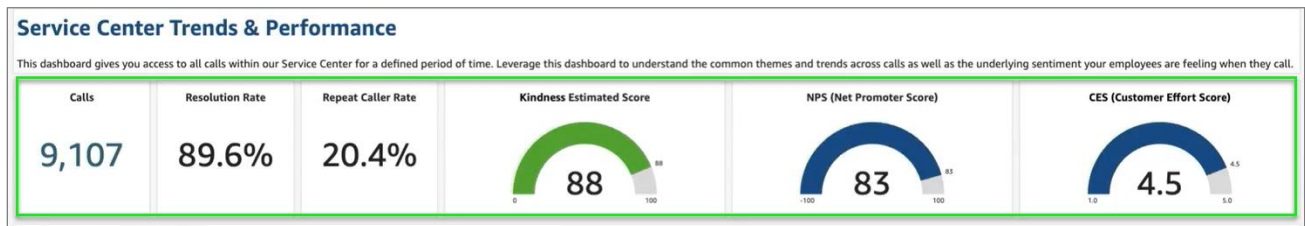
- **Start/End Date:** Show data for a specific time period.

Note Data is not available prior to 8/15/2024.

- **Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
- **Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- **Tenure:** Length of employment.
- **Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.
- **Topic:** Topics that member and Member Advocate covered in the call. These topics are identified by AI based on the call transcript (AE, Birth, COBRA, Demographic Update, etc.).
- **Call Overall Sentiment:** The overall sentiment of the member during the call by color (very positive, positive, concern noted, or negative).
- **Anger Present:** Whether the member was angry at any point during the call.
- **Sentiment Improved:** Whether the member's sentiment improved during the call.
- **Repeat Caller Flag:** Whether the member called again and spoke to a Member Advocate or requested a callback within five business days of the initial call (the initial call falls within the filtered dataset).

High-level Data Highlights

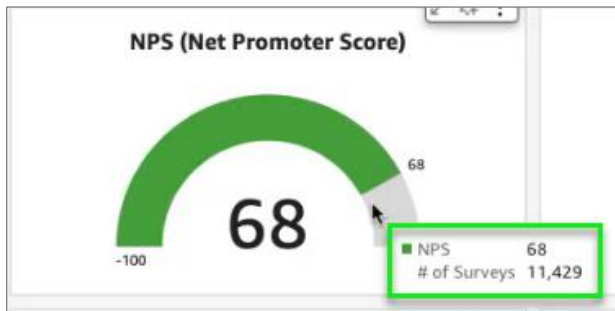
See the tiles directly below the dashboard title and description for a high-level view of important stats.





- **(Total) Calls** (for the filtered dataset).
- **Resolution Rate:** Percentage of calls where case was resolved within 24 hours of the call.
- **Repeat Caller Rate:** Percentage of repeat callers (repeat callers are defined as members who called again and spoke to a Member Advocate or requested a callback within five business days of the initial call).
- **Kindness Estimated Score:** For each call, AI evaluates the transcript and determines a score between 0 and 100 to rate how kind the Member Advocate was to the member. This datapoint is an average of that kindness score across all filtered calls.
- **NPS (Net Promoter Score):** This datapoint comes from members' answers to the [call survey](#). "Considering today's interaction, on a scale of 0 to 10 how likely are you to recommend our agent to your friends, family or co-workers?" Possible answers range from **0 - Not at all likely** to **10 - Extremely likely**. The overall NPS is determined by taking the percentage of promoters (answer is 9 or 10) minus the percentage of detractors (answer is 0-6).

Hover over the tile to see a total count of member-facing survey responses used to calculate the average NPS.



- **CES (Customer Effort Score):** This datapoint comes from members' answers to the [call survey](#). "On a scale of 1 to 5 how easy was it to get your issue resolved?" Possible answers range from **1 - Very Difficult** to **5 - Very Easy**.

Hover over the tile to see a total count of member-facing survey responses used to calculate the average CES.



Overall Sentiment Information

Call Sentiment refers to how the member felt about the interaction with the Member Advocate.





- **Color Definitions:** Sentiment is organized into four colors.
 - **Blue:** Very Positive
 - **Green:** Positive
 - **Yellow:** Concern Noted
 - **Red:** Negative
- **Map:** Shows the total calls and average call sentiment by state for the filtered dataset. Use the buttons in the bottom right corner of the tile to zoom in and out. Hover over a state to see the total calls and average sentiment for a specific location.

Avg. Sentiment and **overall color by state** is determined by translating the sentiment colors to a 1-4 value (1 being red, 4 being blue).

- **Overall blue:** Avg. Sentiment = 3.5 or higher
- **Overall green:** Avg. Sentiment = 2.5 to 3.5
- **Overall yellow:** Avg. Sentiment = 1.5 to 2.5
- **Overall red:** Avg. Sentiment = less than 1.5



- **Call Overall Sentiment:** Chart shows the raw numbers (when user hovers) and percentages of each call sentiment for the filtered total calls.
- **Anger Detected:** Chart shows the raw numbers (when user hovers) and percentages of calls where anger was detected vs. calls where anger was not detected.
- **Sentiment Improved:** Chart shows the raw numbers (when user hovers) and percentages of calls where the member's sentiment improved over the course of the call vs. calls where member's sentiment remained constant or did not improve.

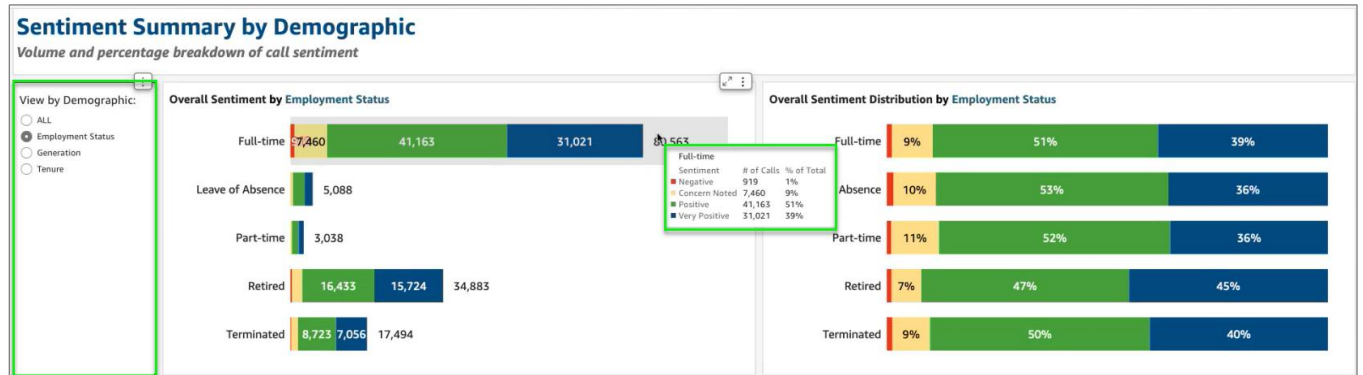
Sentiment Summary by Demographic

View a graphs that represent numbers and percentages for each call sentiment color for the filtered total calls.



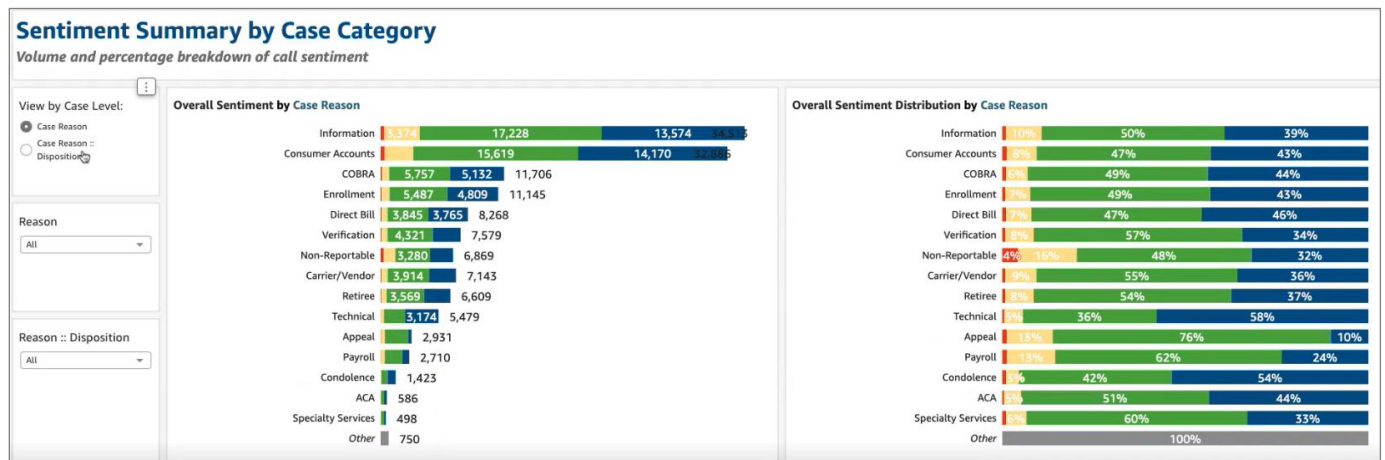


- In the **View by Demographic** tile, change the graph to indicate call sentiment colors for each Employment Status, Generation, or employee Tenure.
- Hover over a section of the graph to see a breakdown of total calls and percentages by sentiment. Hover over a specific color within a section to see the same breakdown for a specific sentiment value.



Sentiment Summary by Case Category

View graphs that show call sentiment colors by Case Reason/Disposition. Case Reason is a higher-level category (e.g., Information) and Case Disposition is a more specific category (e.g., Information :: Life Event).

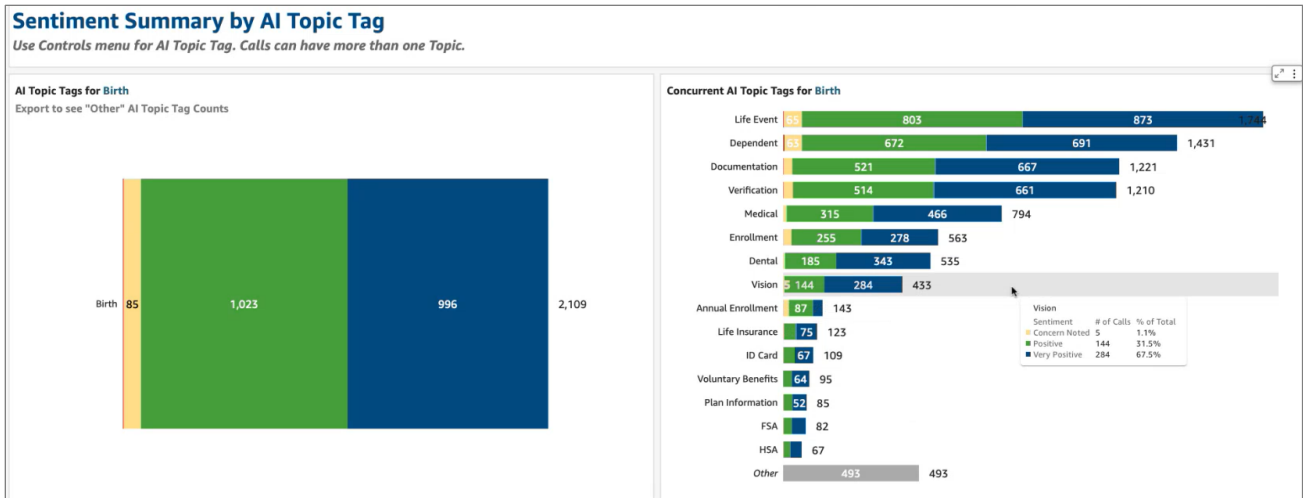


- **View by Case Level** – Choose to show call sentiment by Case Reason or Case Reason and Disposition.
- **Case Reason** – Select specific Case Reasons to view.
- **Case Reason :: Disposition** – Select specific Case Reason and Dispositions to view.

Sentiment Summary by AI Topic Tag

View graphs that show call sentiment colors by topics that member and Member Advocate covered in the call. These topics are identified by AI based on the call transcript (AE, Birth, COBRA, Demographic Update, etc.). **Up to ten topic tags can be applied to a single call** (unlike with Case Reasons and Dispositions, of which a call can only have one).

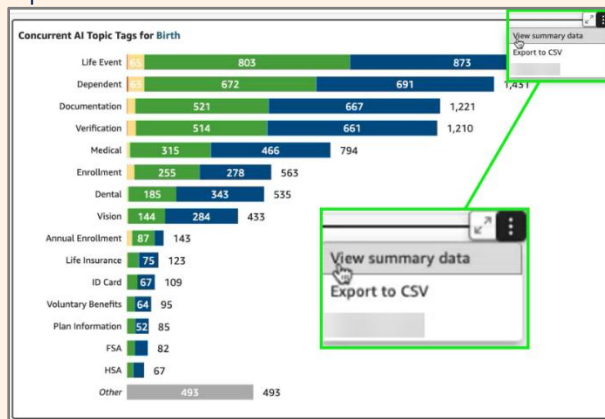




- **AI Topic Tags for [filtered AI Topic Tag]:** View total calls by topic and a breakdown of sentiment associated with the topic(s).
- **Concurrent Call Topic Tags:** View the other topics that are commonly discussed along with the selected topic. View the other topics that were present on calls containing the filtered topic(s). This graph is especially helpful to view when only one topic is filtered, as it shows which other topics are commonly discussed in conjunction with the filtered topic.

Note

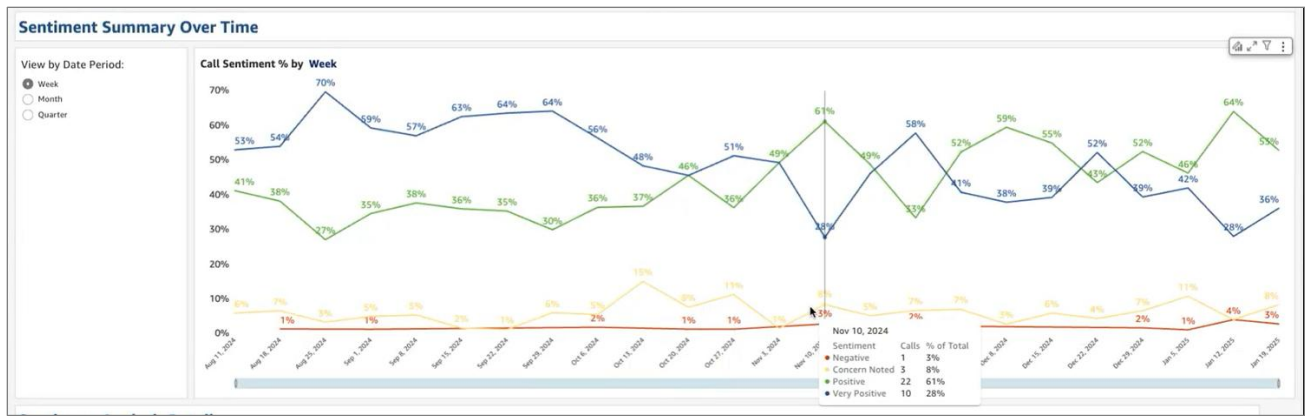
The "Other" category represents any topics not included in the top 15 concurrent topics. View summary data or Export to CSV to see specific topic that fall under "Other."



Sentiment Summary Over Time

See percentages of different sentiment colors by week, month, or quarter. This data can help to identify time periods where sentiment changed, so you can look deeper into those statistics.





Sentiment Analysis Details

View a table of all the filtered calls (based on the Controls section at the top of the page).

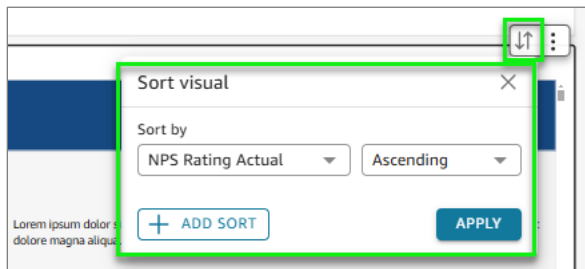
Sentiment Analysis Details

Detailed table data for viewing or export

Use Controls menu to filter this table

Created Date	Case Reason	Case Reason :: Disposition	AI Topic Tags	Member Number	Case Number	Caller Identity	Repeat Caller	Call Overall Sentiment	Sentiment Reason	Anger Detected	Customer Emotions	Call Root Cause	Call Summary
Jan 2, 2025	Appeal	Appeal :: Enrollment/Eligibility	Birth,Documentation	[REDACTED]	544290876	member	No	green	The call demonstrated a good customer experience with friendly agent interaction, relevant information provided, and a clear follow-up plan, despite the issue not being fully resolved.	FALSE	frustrated uncertain	The member was calling to inquire about the process of adding their newborn to their benefits after the thirty-day reporting period.	The member called the company benefits service center to inquire about adding benefits after the thirty-day reporting period. The agent confirmed that the business days for the approval process regarding the addition of the newborn member will need to log into the portal to submit the necessary documentation. The agent informed the member that they would receive updates through the message center and a preference for a callback if desired. The agent provided the member with a preference for a callback if desired. The agent provided the member with a preference for a callback if desired. The agent provided the member with a preference for a callback if desired.
Jan 2, 2025	Appeal	Appeal :: Enrollment/Eligibility	Birth,Life Event	[REDACTED]	49880876	member	No	green	The call demonstrated a good customer experience with the agent showing kindness and empathy, although the issue was not fully resolved.	FALSE	frustrated hopeful	The member was calling to add their newborn to their benefits plan after missing the 30-day deadline due to delays in receiving the social security card and being out of town.	The member called the company benefits service center to seek assistance in their benefits plan after missing the 30-day deadline. The member explained that they missed the deadline because they were out of town and did not receive their social security card. The agent confirmed the 30-day policy and checked the member's profile to see if they could be added. The agent explained that the member would need to log into the portal to submit the necessary documentation. The agent provided information on state insurance and marketplace options and ended with the member expressing appreciation for the agent's help and guidance.

To sort the data in the table, click the **Sort visual** icon in the top right corner.



There is one row for each call. For an individual call, the table indicates:

- **Created Date:** The date the call occurred.
- **Case Reason:** The call reason as identified by the Member Advocate (this is the first part of the Case Disposition).
- **Case Disposition:** The full call disposition as identified by the Member Advocate (includes the Case Reason).
- **AI Topic Tags:** The topics discussed on the call as identified by AI from review of the call transcript.
- **Member Number:** The member's unique number in Benefitsolver. Can be used to locate their member record in Benefitsolver.





- **Case Number:** The unique number to identify the case created for the call. Can be used to locate the case in Benefitsolver.
- **Caller Identity:** Indicates whether the caller is a member. Most calls are received by members, but other audiences like dependents may call the Service Center occasionally.
- **Member Called Again Within a Week:** Yes/No value. Indicates whether the caller called again and spoke to a Member Advocate or requested a callback within five business days.

Note

For calls that happened within the last five business days, the Repeat Caller value is subject to change, as the member could call again within the five-day window.

- **Call Overall Sentiment:** The overall sentiment of the call (by color) as identified by AI based on the call transcript.
- **Sentiment Reason:** The aspects of the call that AI used to determine the "Call Overall Sentiment" color.
- **Anger Detected:** True or False value to indicate whether the caller was angry at any point during the call.
- **Customer Emotions:** Emotions that the caller displayed during the call.
- **Call Root Cause:** The reason(s) why the member called the Service Center.
- **Call Summary:** Summary of the call and what the member and Member Advocate discussed (as identified by AI from the call transcript).
- **Actions Taken:** What the Member Advocate did during the call to address the member's reason(s) for calling.
- **Follow-up:** Actions the Member Advocate or member needs to take to follow up on the member's needs as discussed during the call.
- **Agent Response:** Summary of how the Member Advocate handled the member's issue, including the steps taken to address concerns, provide solutions, or escalate the matter (if necessary).
- **Comment on Agent:** A brief, one-sentence evaluation of the Member Advocate's performance during the call, highlighting strengths or areas for improvement.
- **Agent Tone Analysis:** Descriptors of the Member Advocate's tone throughout the call. Multiple tones may be indicated. Examples:
 - **Friendly:** Expressing warmth and willingness to help (e.g., "I'd love to help you" or "Thank you").
 - **Rude:** Displaying impatience or uncooperative behavior (e.g., "As I stated...").
 - **Lack of Confidence:** Indicating uncertainty or hesitation (e.g., "Umm, I am not sure.>").
 - **Monotone:** Speaking in a flat or disengaged manner with short responses (e.g., "Yes" or "No.>").
- **Agent Evaluation Topic:** Categories used to assess the Member Advocate's performance. Up to three topics selected from the following list. If no system issues were present in the call, shows "All good."
 - **Issue Unresolved:** The problem was not addressed or fixed.
 - **Knowledge Gap:** The Member Advocate lacked necessary knowledge to assist the customer.
 - **Impolite:** The Member Advocate was rude or dismissive.





- **Lacked Empathy:** The Member Advocate did not acknowledge or understand the customer's frustration.
- **Improper Transfer:** The call was transferred incorrectly or unnecessarily.
- **Impatient:** The Member Advocate seemed rushed or unwilling to listen.
- **Technical Issues:** The Member Advocate encountered system-related difficulties.
- **Communication Problems:** The Member Advocate had difficulty conveying information clearly.
- **Partial Resolution:** The issue was only partially resolved.
- **Untimely Resolution:** The resolution process took too long.
- **Lack of Proactivity:** The Member Advocate did not take initiative to offer solutions.
- **No Follow-Up:** The Member Advocate did not schedule or recommend any necessary follow-up actions.
- **Comment on System:** A short, one-sentence remark about the system's functionality during the call, noting any inefficiencies, errors, or strengths.
- **System Evaluation Topic:** Categories used to evaluate the system's effectiveness. Up to three topics selected from the following list:
 - **Agent Training Improvement:** The system does not provide adequate support for Member Advocate training.
 - **Clarify Instructions:** Instructions within the system are unclear or confusing.
 - **Enhance System Functionality:** The system lacks necessary features or efficiency.
 - **Improve Call Transfer Process:** Call transfers are not seamless or frequently fail.
 - **Improve Customer Verification Process:** Identity verification is cumbersome or ineffective.
 - **Enhance Communication and Follow-Up:** The system does not support effective customer communication or follow-ups.
 - **Increase Contact Information Availability:** Customer contact details are incomplete or hard to access.
 - **Improve Billing System:** The billing process lacks clarity or efficiency.
 - **Clarify Insurance Options and Enrollment Periods:** Insurance-related information is unclear or difficult to navigate.
 - **Clarify Coverage Limitations:** Members struggle to understand their coverage details.
 - **Improve Name Change Process:** Updating member names is complex or error prone.
 - **Improve Interdepartmental Coordination:** Departments are not efficiently sharing information.
 - **Clarify Annual Enrollment Documentation Requirements:** Enrollment documentation guidelines are unclear.
 - **Improve Timeliness of Coverage Updates:** Updates to customer coverage take too long to process.





- **Sentiment Emotion Improvement:** True or False value indicating whether the member's sentiment/emotions improved over the course of the call.
- **Was Issue Resolved:** True or False value indicating whether the member's issue that they called about was resolved on the call.

Note

This datapoint is different from the "Resolution Rate" shown in the high-level data highlights toward the top of the page—that Resolution Rate is based on case closure. This one is not based on case closure.

- **Resolution in Agent's Control:** Yes or No value indicating whether the Member Advocate could have resolved the member's issue.
- **Kindness Agent Rating:** For each call, AI evaluates the transcript and determines a score between 0 and 100 to rate how kind the Member Advocate was to the member.

FAQs

- **Q:** Is it possible for the dashboard to identify red (negative) sentiment in a call, but it was not the fault of a Member Advocate?
A: Yes. A call may receive a "red" label when...
 - The Member Advocate was kind and answered the member's questions accurately, but the member didn't like the answers.
- **Q:** How is Resolution Rate calculated?
A: Resolution Rate is the percentage of calls where the case was resolved within 24 hours of the call.
- **Q:** How is the Repeat Caller Rate calculated?
A: When the member called again within five business days of the initial call that falls within the filtered dataset, the initial call is marked as Repeat Caller = Yes. The Repeat Caller Rate datapoint is the percentage of all filtered calls that have Repeat Caller = Yes.
- **Q:** What do the red/yellow/green/blue labels mean?
A: The Call Sentiment colors indicate how the member felt about the interaction.
 - **Blue** - Very Positive
 - **Green** - Positive
 - **Yellow** - Concern Noted
 - **Red** - Negative
- **Q:** Where does the Service Center dashboard data come from?
A: The data ONLY comes from inbound calls to the Service Center and callbacks requested by members. Data does NOT include outbound calls (calls which the member did not initiate/request) or live chats between a member and Member Advocate.





Mobile (App) Analytics

The Mobile Analytics dashboard, which is available to clients who leverage the MyChoice Mobile App, provides data on how members are adopting and using the app.

Controls (Filters)

- **Employment Status:** Filter data by members' employment status (Full-time, Part-time, LOA, Retiree, Terminated, etc.).
- **Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- **Tenure:** Length of employment.
- **Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.

Controls

Employment Status Generation Tenure

Division Subdivision Class Status

Overview Section (“Mobile Analytics Dashboard”)

Shows the iOS and Android app version, number of reviews, rating on app store (this is overall—not specific to the client).

Mobile Analytics Dashboard
Data and tools for insights into your population's activity via the mobile application.
Select the Controls bar above to view and change demographic criteria.

iOS App
iOS 13.4 or Later

- 1M+ downloads
- 11k+ reviews
- 4.8 / 5.0 Rating

Android App
Android 10 or Later

- 500K+ downloads
- 5K+ reviews
- 4.8 / 5.0 Rating

Mobile App Adoption & Activity

See registration rates, recent activity, and user demographics.

Mobile App Adoption & Activity
Registration rates, recent activity, and user demographics.

Last 'X' Days

30
 60
 90
 365

Benefit Eligibility

Select all
 Eligible
 Ineligible

Medical Enrolled

Select all
 Medical Enrolled
 Not Medical Enrolled

View Demographic:

All Users
 Employment Status
 Generation
 Tenure

New Registrations
User signups in the last 30 days

16

Percent Registered
Registered users divided by total employees

Registered	Employees
942	1,181
80%	
79.76%	

Percent Active
Active users divided by registered users in last 30 days

Active	Registered
491	942
52%	
52.12%	

Percent Returning
Returning users divided by active users in last 30 days

Returning	Active
343	491
70%	
69.86%	

Days with Activity by All Users
Number of days users opened the app in last 30 days

Mobile App Adoption

Rows	Employees	New Registrations (Last 30 Days)	Registered Mobile Users	Registered % of Employees	Active Users (Last 30 Days)	Active % of Registered Users (Last 30 Days)	Returning Users (Last 30 Days)	Returning Users % (Last 30 Days)
All Users	1,181	16	942	80%	491	52%	343	70%
Total	1,181	16	942	80%	491	52%	343	70%

- Filters to adjust views of data:
 - **Last X Days:** Select the time period represented in the data.





Note Data is not available prior to 8/15/2024.

- **Benefit Eligibility:** Filter data for benefits-eligible vs. ineligible employees (or set to all employees regardless of benefit eligibility status).
- **Medical Enrolled:** Filter data for employees who are or aren't enrolled in medical benefits.
- **View Demographic:** Select an employee demographic datapoint to view in the tiles and chart. This does not change the member population represented in the data, just which data points display for the population.
- **New Registrations (for last X days):** How many employees registered the app for the first time in the last X days.
- **Percent Registered:** % of employees among the entire filtered employee population who have registered the app.
- **Percent Active:** Percentage of employees who've registered the app who have used it in the last X days.
- **Percent Returning:** Percentage of employees who've registered and used the app on more than one day in the last X days.
- **Days with Activity:** Of the active users of the mobile app for the last X days, shows a breakdown of how many days those users accessed the app. Hover to see total numbers and percentages.
- **Mobile App Adoption:** Table showing the data from the above tiles. Filters on the left dictate the rows represented on the table.

Mobile Application Usage

This section shows engagement rates and user trends within the application. Each graph/table represents unique users who accessed a certain section or page of the app. This is helpful to identify which areas of the app receive the most traffic, and see how traffic varies by demographic.

Mobile Application Usage

Engagement rates and user trends within the application

Start Date

End Date

View Demographic:
 All Users
 Employment Status
 Generation
 Tenure

User Engagement across Product Area by All Users, 2024-10-01 to 2025-02-13
Comparison of unique users who visited each product area

Product Area	All Users
Benefits	553
Home	385
MCA	540
Profile	610
Sofia	386

User Distribution across All Users by Product Area, 2024-10-01 to 2025-02-13
Percentage breakdown of unique users visiting each product area

Product Area	Percentage
Benefits	22%
Home	16%
MyChoice Accounts	22%
Profile	25%
Sofia	16%

Detailed User Engagement across All Users, 2024-10-01 to 2025-02-13
Tabular breakdown of unique user visits by product area/name
Click "+" button to expand to product name

Product Area	Product Name	All Users	Total
+ Benefits		553	553
+ Home		385	385
+ MyChoice Accounts		540	540
+ Profile		610	610
+ Sofia		386	386
Total		838	838

- Filters:
 - **Start and End Date:** Set the time period for the usage data to represent.

Note Data is not available prior to 8/15/2024.



- **View Demographic:** Show a breakdown of Employment Status, Generation, or Tenure for each Product Area category in the charts/graph/tables to the right. This does not change the member population represented in the data, just which data points display for the population.
- **User Engagement across Product Area by [demographic]:** Shows unique users who visited different areas in the app.
- **User Distribution across [demographic] by Product Area:** Percentage breakdown of unique users visiting each product area in the app.
- **Detailed User Engagement across [demographic]:** Shows a chart of the number of unique users who accessed different sections (Product Areas) of the app. Click the + and - icons to expand/minimize more detailed stats on specific page or feature use (Product Names).

Note One unique user may be counted in multiple Product Names.

Detailed User Engagement across All Users, 2024-10-01 to 2025-02-13
Tabular breakdown of unique user visits by product area/name
 Click "+" button to expand to product name

Product Area	Product Name	All Users	Total
Benefits	Select Benefits Summary Button	268	268
	View Benefits Details Page 1	255	255
	View Benefits Details Page 2	314	314
	View ID Cards Page	296	296
	View Pending Benefit Summary Page	46	46
	View Plan Compare Page	29	29
	View Specific ID Card Page	183	183
Home		385	385
MyChoice Accounts		540	540
Profile		610	610
Sofia		386	386
Total		838	838

Table Exports Tab

At the top of the page, click the **Table Exports** tab to access tables that can be exported to CSV with a more complete and granular dataset.

Mobile Analytics | **Table Exports** | Required Audits | old report | 1.30.25 Update (Pac 1)

Controls

Employment Status: All | Generation: All | Tenure: All

Division: All | Subdivision: All | Class: All | Status: All

Registrations and recent activity

Last 'X' Days: 30, 60, 90, 365

Benefit Eligibility: Select all, Eligible, Ineligible

Medical Enrolled: Select all, Medical Enrolled, Not Medical Enrolled

Division	Subdivision	Class	Status	Generation	Employment Status	Tenure Group	New Registrations (Last 30 Days)	Employees	Registered Mobile Users	Active Users (Last 30 Days)	Returning Users (Last 30 Days)
				Generation X	Full-time	60+ months		1	0		
				Baby Boomers	Full-time	07-12 months		1	0		
				Baby Boomers	Full-time	36-60 months		1	0		
				Baby Boomers	Leave of Absence	60+ months		1	0		
				Generation X	Full-time	0-6 months		1	1		
				Millennials	Leave of Absence	60+ months		1	0		
				Generation X	Part-time	60+ months		1	0		
				Baby Boomers	Retired	60+ months	1	1	1	1	
				Other	Retired	60+ months		1	0		
				Baby Boomers	Full-time	60+ months		1	1		
				Other	Retired	60+ months		1	0		

View: 500 items | << 1 of 3 >>



Campaign Analytics

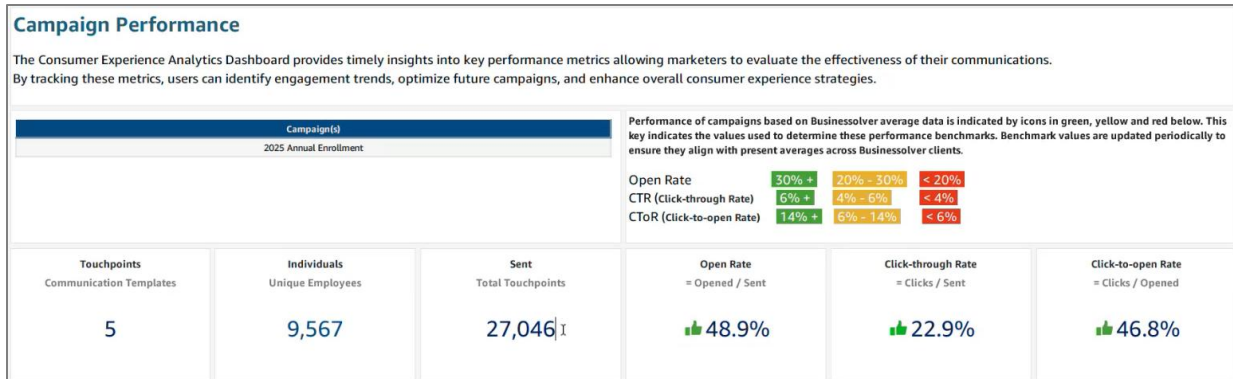
Controls (Filters)

Campaign Analytics | Campaign Click Journey | Definitions and Details

Controls

Start Date 2024/09/29	End Date 2025/01/22	Employment Status * All	Generation All	Tenure * All
Division All	Subdivision All	Class All	Status All	
Campaign Category All	Campaign All	Touchpoint All		

- **Start/End Date:** Show data for a specific time period.
- **Employment Status:** Filter data by members' employment status (Full-time, LOA, Retiree, Terminated, etc.).
- **Generation:** Member generation by Baby Boomer, Gen X, Millennial, and Gen Z.
- **Tenure:** Length of employment.
- **Division, Subdivision, Class, Status:** Groups that members belong to in Benefitsolver, which make up Structure Groups.
- **Campaign Category:** Types of campaigns (i.e., Activation Path or Open Enrollment).
- **Campaign:** The different types of campaign (i.e., 2025 Annual Enrollment, Rx Savings Solutions Education, etc.)
- **Touchpoint:** This refers to the specific interaction methods used to reach members within a campaign.



The **Campaign Analytics Dashboard** provides timely insights into key performance metrics allowing marketers to evaluate the effectiveness of their communications. By tracking these metrics, admins can identify engagement trends , optimize future campaigns, and enhance overall consumer experience strategies.





Campaign(s)

Campaign(s)
2025 Annual Enrollment

- **Campaigns:** If a client has multiple campaigns (i.e., 2025 AE campaign, January 2025 Activation path), they will be listed under the campaign section. If there are multiple campaigns, you can toggle between the different campaigns available.

KPI's

This section covers the key data metrics that we measure. These metrics are the overall campaign performance.

Touchpoints Communication Templates	Individuals Unique Employees	Sent Total Touchpoints	Open Rate = Opened / Sent	Click-through Rate = Clicks / Sent	Click-to-open Rate = Clicks / Opened
5	9,567	27,046	👍 48.9%	👍 22.9%	👍 46.8%

- **Touchpoints** (Communication Templates): This counts every time any link is clicked on a touchpoint. It does not double count the same URL link click within a rolling 10-minute window.
- **Individuals** (Unique Employees): This is the number of unique employees that the email was sent to.
- **Sent** (Total Touchpoints): This is the total number of emails that were sent.
- **Open Rate** (=Opened/Sent): The number of emails that were opened divided by the number of emails sent.
- **Click-through Rate** (=Clicks/Sent): The number of emails that registered a click divided by the number of emails opened.
- **Click-to-open Rate** (=Clicks/Opened): The number of emails that registered a click divided by the number of emails opened.

Important!

The metrics indicator will allow you to determine what was successful (**Green**), what needs improvement (**Yellow**), and what was below average engagement (**Red**). The benchmark values will be periodically updated as we get more data from our clients.

Performance of campaigns based on Businessolver average data is indicated by icons in green, yellow and red below. This key indicates the values used to determine these performance benchmarks. Benchmark values are updated periodically to ensure they align with present averages across Businessolver clients.

Open Rate	30% +	20% - 30%	< 20%
CTR (Click-through Rate)	6% +	4% - 6%	< 4%
CToR (Click-to-open Rate)	14% +	6% - 14%	< 6%





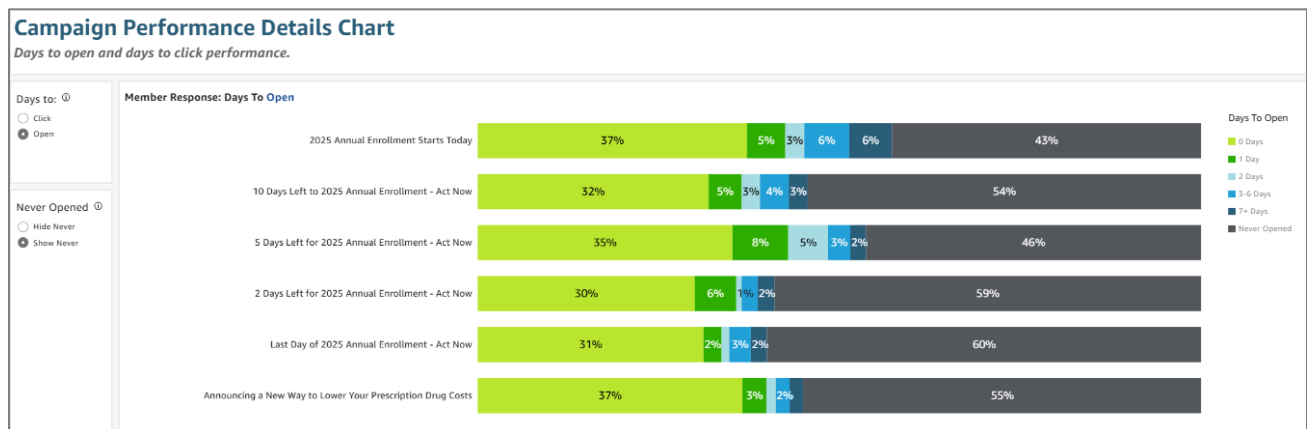
Campaign Touchpoints Summary

Campaign Touchpoints			First Sent Date	Sent	Opened	Open Rate	Clicks	Click-through Rate (CTR)	Click-to-open Rate (CToR)
Campaign	Channel	Touchpoint							
2025 Annual Enrollment	Email	2025 Annual Enrollment Starts Today	Oct 16, 2024	7,960	4,539	57%	2,310	29%	51%
		10 Days Left to 2025 Annual Enrollment - Act Now	Oct 23, 2024	7,369	3,352	45%	1,298	18%	39%
		5 Days Left for 2025 Annual Enrollment - Act Now	Oct 28, 2024	4,620	2,470	53%	1,251	27%	51%
		2 Days Left for 2025 Annual Enrollment - Act Now	Oct 31, 2024	3,879	1,581	41%	713	18%	45%
		Last Day of 2025 Annual Enrollment - Act Now	Nov 1, 2024	3,218	1,279	40%	610	19%	48%
Total			Oct 16, 2024	27,046	13,221	49%	6,182	23%	47%

This section provides a tabular breakdown of the different campaigns and touchpoint metrics sent as part of the campaign.

- **Campaign:** The type of campaign (i.e., 2025 Annual Enrollment).
- **Channel:** The type of communication channel (i.e., email).
- **Touchpoint:** This counts every time any link is clicked on a touchpoint. It does not double count the same URL link click within a rolling 10-minute window.
- **First Sent Date:** The first date the communication was sent.
- **Sent:** The total amount that was sent to members.
- **Opened:** The amount that was opened.
- **Open Rate:** The amount that was opened represented in a percentage.
- **Clicks:** The number of emails that registered at least one click.
- **Click-through Rate (CTR):** The number of emails that registered a click divided by the number of emails sent.
- **Click-to-open Rate (CToR):** The number of emails that registered a click divided by the number of emails opened.

Campaign Performance Details Chart



- This chart is a breakdown of the days to open and days to click performance. **Filter Options:**
 - **Days to:**





Click: When selected, this will display data on how long it took members to click on the campaign link after opening the message.

Open: When selected, this will display data on how long it took members to open the message after it was sent to them.

- **Never Clicked:**
 - **Hide Never:** Excludes members who never clicked on the campaign link
 - **Show Never:** Will display the members who never clicked on the campaign link.

Campaign Performance Details Table

Days to Open (1st table): This table shows when emails were opened/clicked based on the number of days post-send as a numerical value.

Days to Open										
Touchpoint	0 Days	1 Days	2 Days	3 Days	4 Days	5 Days	6 Days	7+ Days	Sent, Never Opened	Total
2025 Annual Enrollment Starts Today	2,963	420	210	44	100	198	151	453	3,421	7,960
10 Days Left to 2025 Annual Enrollment - Act Now	2,352	336	188	51	113	84	45	183	4,017	7,369
5 Days Left for 2025 Annual Enrollment - Act Now	1,627	356	254	85	43	12	3	90	2,150	4,620
2 Days Left for 2025 Annual Enrollment - Act Now	1,164	222	29	22	36	17	12	79	2,298	3,879
Last Day of 2025 Annual Enrollment - Act Now	1,005	80	34	51	20	19	7	63	1,939	3,218
Total	9,111	1,414	715	253	312	330	218	868	13,825	27,046

Days to Open (2nd table): This table shows when emails were opened/clicked based on the number of days post-send as a percentage of the total number of emails sent.

Days to Open										
Touchpoint	0 Days	1 Days	2 Days	3 Days	4 Days	5 Days	6 Days	7+ Days	Sent, Never Opened	Total
2025 Annual Enrollment Starts Today	37%	5%	3%	1%	1%	2%	2%	6%	43%	100%
10 Days Left to 2025 Annual Enrollment - Act Now	32%	5%	3%	1%	2%	1%	1%	2%	55%	100%
5 Days Left for 2025 Annual Enrollment - Act Now	35%	8%	5%	2%	1%	0%	0%	2%	47%	100%
2 Days Left for 2025 Annual Enrollment - Act Now	30%	6%	1%	1%	1%	0%	0%	2%	59%	100%
Last Day of 2025 Annual Enrollment - Act Now	31%	2%	1%	2%	1%	1%	0%	2%	60%	100%
Total	34%	5%	3%	1%	1%	1%	1%	3%	51%	100%

- Filter Options:
 - **Days to:**
 - **Click:** When selected, this will display data on how long it took members to click on the campaign link after opening the message.
 - **Open:** When selected, this will display data on how long it took members to open the message after it was sent to them.
 - **Never Clicked:**





- **Hide Never:** Excludes members who never clicked on the campaign link.
- **Show Never:** Will display the members who never clicked on the campaign link.

Campaign Click Journey Tab

Campaign Analytics **Campaign Click Journey** Definitions and Details

Controls

Start Date: 2024/09/29 End Date: 2025/01/22 Employment Status * Ⓞ: All Generation: All Tenure * Ⓞ: All

Division: All Subdivision: All Class: All Status: All

Campaign Category: All Campaign: All Touchpoint: All

This section covers where a member goes to in Benefitsolver once a member clicks the URL in their email.

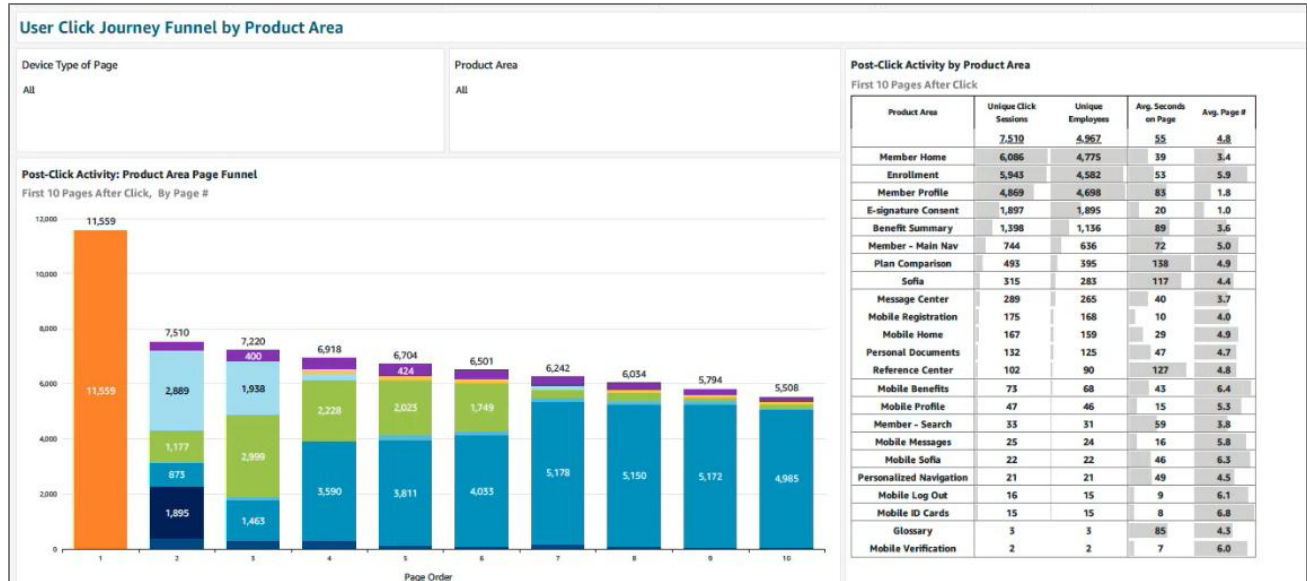
Campaign Click Journey					
Individuals Unique Employees	Sent Total Touchpoints	Opens Touchpoints Opened	Clicks Unique Touchpoints Clicks	Click-through Rate = Clicks / Sent	Total Touchpoint Clicks Counts every time any link is clicked on a touchpoint
9,567	27,046	13,221	6,182	22.9%	11,751

- **Individuals:** This is the number of unique employees that the email was sent to.
- **Sent:** The total number of emails sent.
- **Opens:** The total number of emails opened.
- **Clicks:** The total number of emails that registered at least one click.
- **Click-through Rate:** The number of emails that registered a click divided by the number of emails sent.
- **Total Touchpoint Clicks:** This counts every time any link is clicked on a touchpoint, does not double counts same URL link click within a rolling 10-minute window.





User Click Journey Funnel by Product Area



- **Post-Click Activity: Product Area Page Funnel:** This graph showcases the first 10 pages a member visited after clicking the link in their email.

Note: We don't track the links that route outside of Benefitsolver, which will explain a drop from page 0 to page 1.

- **Post-Click Activity by Product Area:** This data mirrors the Product Area Page Funnel but highlights the 10 specific product areas the member visits after clicking the link.
 - **Unique Click Sessions:** When a member clicks a link and then clicks it again two hours later, this will create two click sessions of activity.
 - **Unique Employees:** This data shows how many members clicked in that product area.
 - **Average Seconds on Page:** The average number of seconds an employee stays on in the product area.
 - **Average Page #:** The average number of pages the member visits in the product area.

Definitions and Details Tab

Campaign Analytics	Campaign Click Journey	Definitions and Details
<p>KPI Definitions:</p> <p>Open Rate The number of emails that were opened divided by the number of emails sent. Please see "Open Rate Details:"</p> <p>Click-to-open Rate (CToR) The number of emails that registered a click divided by the number of emails opened.</p> <p>Clicks The number of emails that registered at least one click.</p> <p>Click-through Rate (CTR) The number of emails that registered a click divided by the number of emails sent.</p> <p>Total Touchpoint Clicks This Counts every time any link is clicked on a touchpoint, does not double count same URL Link Click within a rolling 10 minute window.</p>		<p>Open Rate Details:</p> <p>Opens can be under reported. An open can only be recorded if the reader's email client is capable of displaying HTML with images, and that option is turned on. Similarly, people may choose to read your HTML email without displaying images, so that will not be recorded as an open either. However, we do record an open for subscribers who clicked a link (excluding the unsubscribe link) in your campaign, even if they didn't download images.</p> <p>Opens that can't be reliably tracked</p> <p>1) Images preloaded by an email provider Certain email clients, including Gmail, Yahoo, and Apple Mail, preload the images in emails, including the transparent single-pixel image that marketers use to track email opens, which results in an open being tracked regardless of if the recipient actually opened the email or not. This is to protect the privacy of the recipient, but it also means that we can't reliably track these opens and your open rate will be falsely inflated. Instead of relying on your email's open rate to determine its performance, be sure to focus on the more important metrics for your business in order to gauge the effectiveness of your marketing efforts.</p> <p>2) Images blocked by an email provider Email opens can't be tracked when the image pixel can't display. For most of your contacts, this happens when their email provider doesn't support images, when they've blocked images from displaying for content concerns, or because images use extra data on a mobile device. If your contacts let you know they can't see the images in their emails, you can help them enable them in their email client, but there isn't much more you can do about missing images.</p> <p>3) Text-only version of an email Every email that's sent has both an HTML version and a text-only version. When you send your email, both versions go out to your contacts and their email client decides which email they see. The image pixel is not supported in the text-only version of the email, so the only way to track opens is when your contacts click a link in the email. Most of the larger email providers (Outlook, Gmail, Yahoo, etc.) support the HTML version, but you have no control over which version your contacts see. To increase the chances of collecting open information, make sure there's at least one link in your email and it's formatted to get more clicks.</p>

Provides definitions and details of what each KPI represents and Open Rate details.





Enrollment Survey Dashboard

The **Enrollment Survey dashboard** provides insight into how employees are answering the questions of the enrollment survey. There are filters to narrow down the population represented. Clients get near real-time access into how their employees felt when completing the benefits enrollment and the critical commentary that drives benefits strategies.

Enrollment Experience Survey

Enrollment survey data is an excellent tool for gaining deeper insights into your population's perspectives on the enrollment process and the information provided during their enrollment journey.

Selected Enrollment Type: All
To change enrollment, date range, or demographic criteria, use filter controls above

Surveys Offered	Responses	Response Rate %	Comments	% Good or Excellent: Overall Experience	Average Rating: Client vs. National Overall Experience (1-5)
2,716	1,352	49.8%	88	93.8% <small>Client Rating</small>	4.62 <small>Client Rating</small>
				National Avg. 85.3% ▲ 8.5%	National Avg. 4.36 ▲ 0.26

Survey Response Summary

Survey Question

Overall Experience
 Decision Confidence
 Ease of Process
 Understanding of Benefits

View By Demographic:

All
 Employment Status
 Generation
 Tenure

Count or Percent

Count
 Percent

Average Rating: Client vs. National
Overall Experience (1-5)

4.62

Client Rating

National Avg. **4.36** ▲ 0.26

Average Rating Over Time
Overall Experience (1-5)

Count of Responses by Generation
Overall Experience

Baby Boomers	13	35	52	
Generation X	16	63	165	245
Millennials	14	83	245	347
iGen (or Gen Z)	5			

■ (1) Very poor ■ (2) Poor ■ (3) OK ■ (4) Good ■ (5) Excellent

Survey Comments and Response Details

Survey comments are a valuable resource for gaining insights into what assisted employees in completing enrollment and identifying any challenges they encountered. To quickly identify themes, we automatically categorize comments by topic and issue.

Overall Experience: All

Topic: All

Comments: Has Comment

Problem Area: All

Issues: All

Suggestions: All

Date	Overall Experience	Decision Confidence	Ease of Process	Understanding of Benefits Offered	Topic	Additional Comments	Problem Area	Issues	Suggestions	Employment Status	Generation	Tenure
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	enrollment process benefits	DEMO: Additional comments displayed here	Limited Options	DEMO: Issues displayed here	None	Full-time	Generation X	36-60 months
Jun 1, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	enrollment process benefits coverage	DEMO: Additional comments displayed here	Hard to Find/Missing Details	DEMO: Issues displayed here	None	Retired	Baby Boomers	36-60 months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	enrollment process dependent enrollment benefits	DEMO: Additional comments displayed here	None	None	None	Full-time	Generation X	60+ months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	health insurance	DEMO: Additional comments displayed here	Lack of Support	DEMO: Issues displayed here	DEMO: Suggestions displayed here	Full-time	Millennials	60+ months
Jun 1, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	no topic	DEMO: Additional comments displayed here	None	None	None	Full-time	Baby Boomers	24-36 months
Jun 1, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	no topic	DEMO: Additional comments displayed here	None	None	None	Full-time	Baby Boomers	60+ months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(4) Very well	enrollment process benefits dental	DEMO: Additional comments displayed here	Other Issues	DEMO: Issues displayed here	DEMO: Suggestions displayed here	Full-time	Millennials	12-24 months

©Businessolver.com, Inc. 2025

Overview of Benefits Insights Dashboard and Member Surveys | **Error! No text of specified style in document.**

businessolver.com **33** of 41



Benefits Literacy Survey Dashboard

The **Benefits Literacy Survey dashboard** provides insight into how employees are answering the questions of the benefits literacy survey. There are filters to narrow down the population represented.

Benefit Literacy Survey

Benefit literacy surveys assess how well employees understand benefits offered by their employers. This can serve as a helpful resource to identify which programs may need further education and promotion.

<p>Literacy Rate: Client vs. National</p> <div style="display: flex; align-items: center; justify-content: center;"> 86% </div> <p style="font-size: 10px; margin: 2px 0;">Client Rating</p> <p style="font-size: 10px; margin: 2px 0;">National Avg. 41% ▲ 44%</p>	<p>Responses</p> <p style="font-size: 10px;">Members responding to at least 1 question</p> <div style="font-size: 24px; font-weight: bold;">215</div>	<p>Surveys Offered</p> <div style="font-size: 24px; font-weight: bold;">1,730</div>	<p>Response Rate</p> <div style="font-size: 24px; font-weight: bold;">12.4%</div>
--	--	--	--

Benefit Literacy Results

Literacy rates by selected demographic & location and poll answer breakdown

View By Demographic:

Employment Status

Generation

Tenure

Minimum Response Count ⊙

All ▼

Literacy Rate by Employment Status

Rows	Full-time	Leave of Absence	Part-time	Retired	Terminated	Total
Accident	75%		100%		75%	76%
Critical Illness	79%				25%	75%
FSA	88%	100%	0%	100%	88%	88%
HSA	98%	100%		100%	94%	97%
Hospital Indemnity	75%				75%	75%
Total	86%	100%	50%	100%	82%	86%

Literacy Rate by State

Benefit

Accident

Critical Illness

FSA

HSA

Hospital Indemnity

Response Details

Correct answer in green

Question	Response	Responses %	% of Total
Accident	Provides cash payout to help pay for unexpected expenses due to an accident	50	76%
	Offers income protection if you are unable to work due to an accident	13	20%
	Reimburses medical expenses you paid due to a health condition	2	3%
	Covers repair costs to your vehicle if you have a car accident	1	2%



Benefits Preference Survey Dashboard

The **Benefits Preference Survey** dashboard provides insight into how employees are answering the questions of the preference survey. There are filters to narrow down the population represented. Clients get near real-time access into how employees view the benefits offered now or benefits that may be offered in the future. This is a great way to gain clarity in what matters to employees or where there is opportunity for greater education and communication.





Member Surveys

Breakdown of Each Survey

Enrollment Survey

Enrollment Experience Survey

Enrollment survey data is an excellent tool for gaining deeper insights into your population's perspectives on the enrollment process and the information provided during their enrollment journey.

Selected Enrollment Type: All
To change enrollment, date range, or demographic criteria, use filter controls above

Surveys Offered 2,716	Responses 1,352	Response Rate % 49.8%	Comments 88	% Good or Excellent: Overall Experience 93.8% Client Rating National Avg. 85.3% ▲ 8.5%	Average Rating: Client vs. National Overall Experience (1-5) 4.62 Client Rating National Avg. 4.36 ▲ 0.26
--	----------------------------------	--	------------------------------	--	---

Survey Response Summary

Survey Question

- Overall Experience
- Decision Confidence
- Ease of Process
- Understanding of Benefits

View By Demographic:

- All
- Employment Status
- Generation
- Tenure

Count or Percent

- Count
- Percent

Average Rating: Client vs. National Overall Experience (1-5)

4.62
Client Rating
National Avg. 4.36 ▲ 0.26

Overall Experience

Count of Responses by Generation

Overall Experience

Baby Boomers	13	35	52	
Generation X	16	63	165	245
Millennials	14	83	245	347
iGen (or Gen Z)	5			

Legend: (1) Very poor (2) Poor (3) Ok (4) Good (5) Excellent

Survey Comments and Response Details

Survey comments are a valuable resource for gaining insights into what assisted employees in completing enrollment and identifying any challenges they encountered. To quickly identify themes, we automatically categorize comments by topic and issue.

Overall Experience: Topic: Comments: Problem Area: Issues: Suggestions:

Survey Responses

Date	Overall Experience	Decision Confidence	Ease of Process	Understanding of Benefits Offered	Topic	Additional Comments	Problem Area	Issues	Suggestions	Employment Status	Generation	Tenure
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	enrollment process benefits	DEMO: Additional comments displayed here	Limited Options	DEMO: Issues displayed here	None	Full-time	Generation X	36-60 months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	enrollment process benefits coverage	DEMO: Additional comments displayed here	Hard to Find/Missing Details	DEMO: Issues displayed here	None	Retired	Baby Boomers	36-60 months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	enrollment process dependent enrollment benefits	DEMO: Additional comments displayed here	None	None	None	Full-time	Generation X	60+ months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	health insurance	DEMO: Additional comments displayed here	Lack of Support	DEMO: Issues displayed here	DEMO: Suggestions displayed here	Full-time	Millennials	60+ months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	no topic	DEMO: Additional comments displayed here	None	None	None	Full-time	Baby Boomers	24-36 months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(5) Extremely well	no topic	DEMO: Additional comments displayed here	None	None	None	Full-time	Baby Boomers	60+ months
Jun 3, 2024	(5) Excellent	(5) Extremely confident	(5) Extremely easy	(4) Very well	enrollment process benefits dental	DEMO: Additional comments displayed here	Other Issues	DEMO: Issues displayed here	DEMO: Suggestions displayed here	Full-time	Millennials	12-24 months

The Enrollment Survey appears at the end of the member enrollment flow (when the member reaches the Thank You layout) and asks four questions about the enrollment experience, followed by an optional commentary section.





How was your enrollment experience? ×

If you have a minute, tell us what you think.

Overall, how **easy** was your enrollment process?

1 2 3 4 5
Not at all easy Not so easy Somewhat easy Very easy Extremely easy

How well do you feel you **understood** the benefits offered to you?

1 2 3 4 5
Not at all well Not so well Somewhat well Very well Extremely well

How **confident** do you feel in the benefits decision you made?

1 2 3 4 5
Not at all confident Not so confident Somewhat confident Very confident Extremely confident

Overall, how would you describe your enrollment experience?

1 2 3 4 5
Very poor Poor Ok Good Excellent

Additional comments about your enrollment experience

Who sees the survey?

The Enrollment Survey can be turned on for specific enrollment BARs, like new hires, open enrollment, life events, and newly eligible enrollments.

How is it helpful?

The Enrollment Survey provides members' rating scores for the ease of the enrollment process, their understanding of benefits, confidence in their decisions, and their overall score for the experience. Comments will be automatically summarized by topic, sentiment, issues, and suggestions to provide insights for clients.

Additional important notes:

- The survey will NOT display for death of dependent and divorce life events.
- Upon launch, when a client admin logs into Benefitsolver, they will see a new Benefits Insights option within their analytics. Once they click into the Benefits Insights Dashboard, they will be presented with the various dashboards they have access to based on the services and tools they use.
- This survey will appear after EVERY applicable enrollment.





Benefits Literacy Survey

Benefit Literacy Survey

Benefit literacy surveys assess how well employees understand benefits offered by their employers. This can serve as a helpful resource to identify which programs may need further education and promotion.

Literacy Rate: Client vs. National 86% <small>Client Rating</small> <small>National Avg. 41% ▲ 44%</small>	Responses <small>Members responding to at least 1 question</small> 215	Surveys Offered 1,730	Response Rate 12.4%
---	--	--	--------------------------------------

Benefit Literacy Results

Literacy rates by selected demographic & location and poll answer breakdown

View By Demographic:

Employment Status

Generation

Tenure

Minimum Response Count Ⓞ

All

Literacy Rate by Employment Status

Rows	Full-time	Leave of Absence	Part-time	Retired	Terminated	Total
Accident	75%		100%		75%	76%
Critical illness	79%				25%	75%
FSA	88%	100%	0%	100%	88%	88%
HSA	98%	100%		100%	94%	97%
Hospital Indemnity	75%				75%	75%
Total	86%	100%	50%	100%	82%	86%

Literacy Rate by State

Benefit

Accident

Critical Illness

FSA

HSA

Hospital Indemnity

Response Details

Correct answer in green

Question	Response	Responses %	% of Total
Accident	Provides cash payout to help pay for unexpected expenses due to an accident	50	76%
	Offers income protection if you are unable to work due to an accident	13	20%
	Reimburses medical expenses you paid due to a health condition	2	3%
	Covers repair costs to your vehicle if you have a car accident	1	2%

The Benefits Literacy Survey is designed to capture members' understanding of their benefits. It specifically targets member knowledge of FSA, HSA, Hospital Indemnity, Accident, Critical Illness, preventative care, care settings (i.e., emergency room vs. primary care provider, and pharmacies and medication.

- The member will either see the HSA/FSA questions, or the accident, critical illness, and hospital indemnity questions. As of 1/1, they also may see the preventative car, care setting, or pharmacy and mediation questions.
- 2-3 questions will display.
- Once the member has answered the questions, the survey will educate them by showing their answers and whether they were right or wrong.

Question 1 of 5


Which of the following statements about Healthcare Flexible Spending Accounts (FSA) are **TRUE**?

- FSA contributions are taxed the same as the rest of your income
- You can only enroll in an FSA if you also enroll in a high-deductible health plan (HDHP)
- Any money not spent on eligible healthcare expenses during the plan year is lost
- Healthcare FSAs can only be used to pay for medical expenses you incur at a in-network doctor's offices or hospitals

Next






Healthcare Flexible Spending Account (FSA) Facts

✗ False
FSA contributions are taxed the same as the rest of your income.

FSA contributions are **not taxed** which can help you save money on eligible, expected healthcare costs.

✗ False
You can only enroll in an FSA if you also enroll in a high-deductible health plan (HDHP)

You can enroll in a Healthcare FSA, regardless of medical plan. You can even enroll if you waive coverage or have coverage under someone else's policy.

✓ True
Any money not spent on eligible healthcare expenses during the plan year is lost.

Healthcare FSAs are best used for **expected medical expenses**. Before deciding how much to contribute, ask yourself how much you're likely to spend within the year. This is because any money left over by the end of the year might not carry over to the next and may be lost.

✗ False
Healthcare FSAs can only be used to pay for medical expenses you incur at a in-network doctor's offices or hospitals.

FSA contributions are **not taxed** which can help you save money on expected healthcare costs.

You can use your Healthcare FSA on **eligible medical expenses**, such as copays and deductibles, select medical devices, qualified prescription drugs and more. You can find your list of eligible medical expenses in your plan documents or on the IRS website.

[Next](#)

Who sees the survey?

The survey will display upon login for a small subset of the client's member population (10-20%) throughout the year.

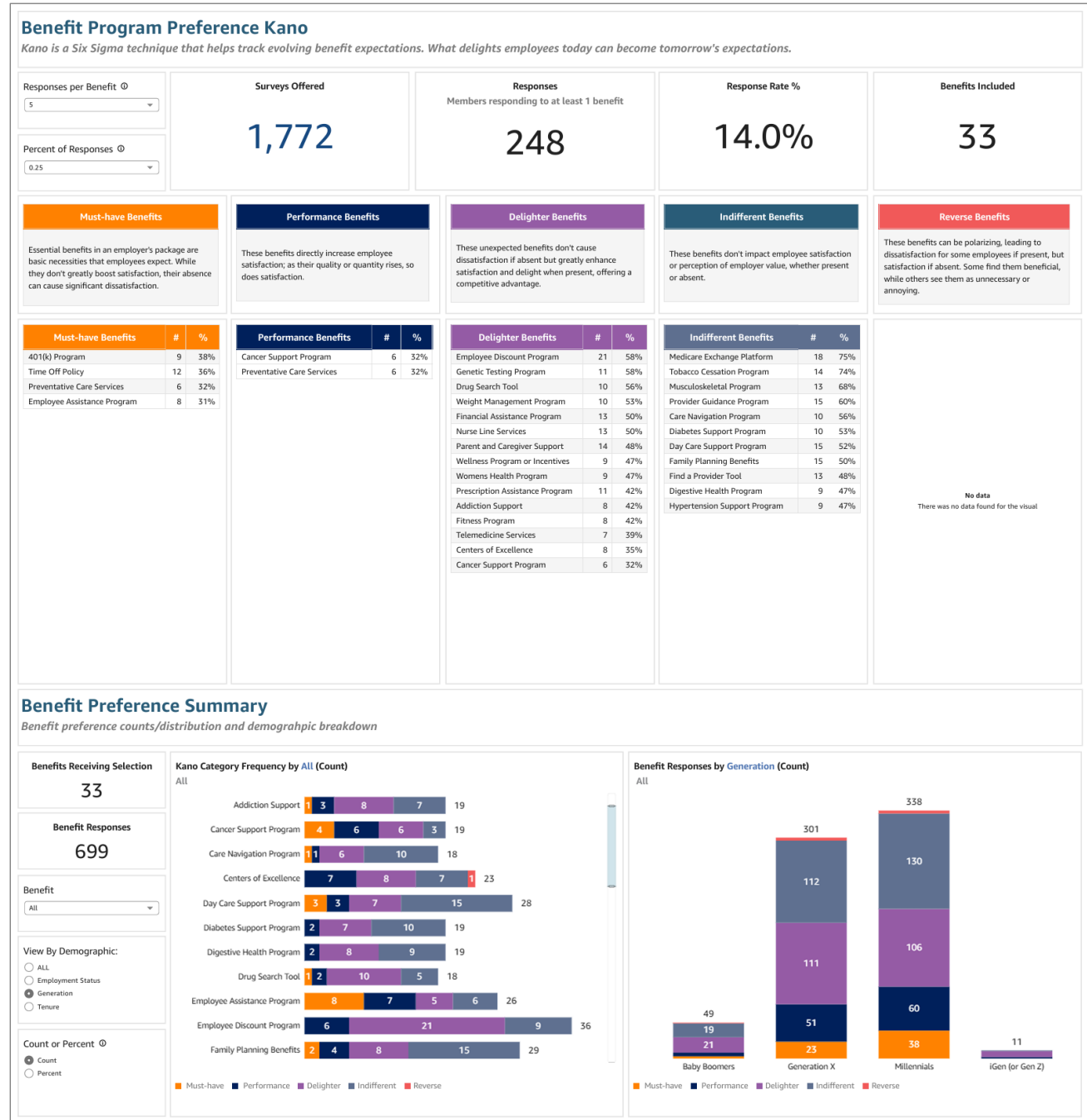
How is it helpful?

The Benefits Literacy Survey helps assess the member's level of benefits knowledge and educates them on the topic presented. This data can be used to segment employees by knowledge level and ultimately drive targeted communications and personalized experiences in Benefitsolver and the MyChoice Mobile App.





Benefits Program Survey




The Benefits Program Survey leverages the Kano survey method and is built to understand member preferences for benefits—which benefit programs matter the most to them. The survey asks members to provide their preference on specific benefit programs.

In addition to asking about benefits programs, we now have the ability to present questions about electable benefits as well. For these questions to appear, you must work with your client team to turn them on in Company Access. We highly recommend you do so as the feedback will help you understand what electable benefits your employees truly want.





- The member will be presented with three benefit programs (e.g., care navigation, telemedicine, and provider guidance).
- The survey will ask the member how they would feel if their employer did or did not offer the benefit program.

 **Care Navigation Program**

Care Navigation is an optional service which provides you with access to a team of experts who can help you understand your benefits, find opportunities and programs, and help you make decisions based on this information. Care navigation experts operate in your best interest in mind, giving you peace-of-mind whenever you need to make use of your paid benefits.

How would you feel if your employer offered care navigation program?

I like it

I expect it

I'm neutral

I can tolerate it

I dislike it

How would you feel if your employer **DID NOT** offer a care navigation program?

I like it

I expect it

I'm neutral

I can tolerate it

I dislike it

[Next](#)

Who sees the survey?

The survey will display upon login for a small subset of the client's member population (10-20%) throughout the year.

How is it helpful?

The Kano model ranks each benefit program on its potential to delight/satisfy or frustrate/dissatisfy members. This data can help clients determine whether their current benefit programs are meaningful to members and identify which kinds of programs they may want to provide in the future. The data may also reveal opportunities to drive engagement for current offerings.