

 Benefits Technology, Powered by People

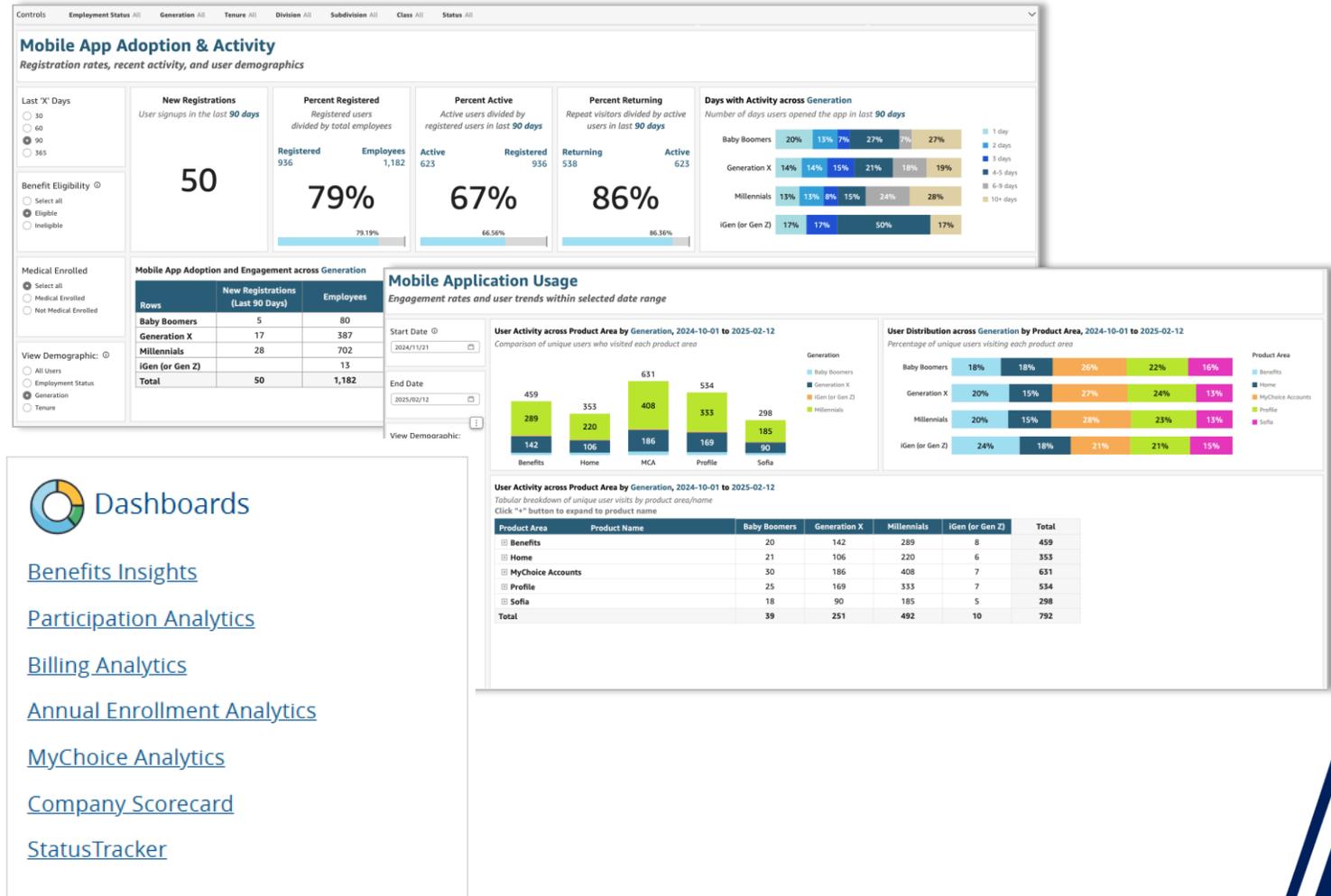
New Benefits Insights Dashboard

Benefits Participation & Premium Cost Analytics



What is the Benefits Insights Dashboard?

- The Benefits Insights Dashboard is our insight and analytics dashboard that provides you impactful data around how your employees are leveraging our technology and services, as well as key insights into their benefits decisions and enrollment.
- This is data that can be directly tied to the outcomes of our technology and how our partnership is delivering on your benefits strategies.



What is the new Participation & Premium Cost Analytics Dashboard?

- We have a new Benefits Insights Dashboard releasing that you should not sleep on! The new Benefits Participation & Premium Cost Analytics Dashboard will release on **12/1**.
- This dashboard features five tabs that deliver an improved experience on our participation, billing, and annual enrollment analytics. Those legacy analytics will remain available for those who need access, but we're excited to provide you a better experience.

Benefits Insights

Employee Experience & Engagement

[Enrollment Surveys](#)

[Benefits Literacy Survey](#)

[Campaign Analytics](#)

[Mobile Analytics](#)

Cost & Trend Management

[Benefits Participation and Premium Costs Analytics](#)

HR Efficiency & Mitigation

[Benefits Preference Kano Survey](#)

[Service Center Trends and Performance](#)

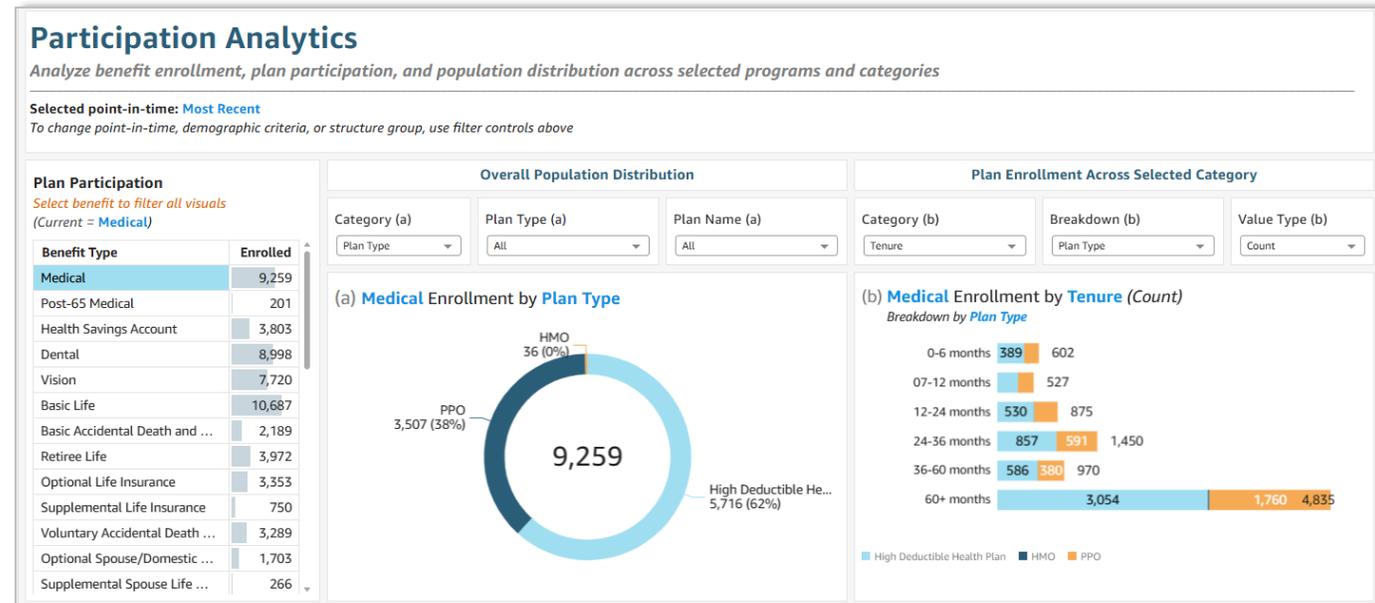


Let's look at the new dashboard



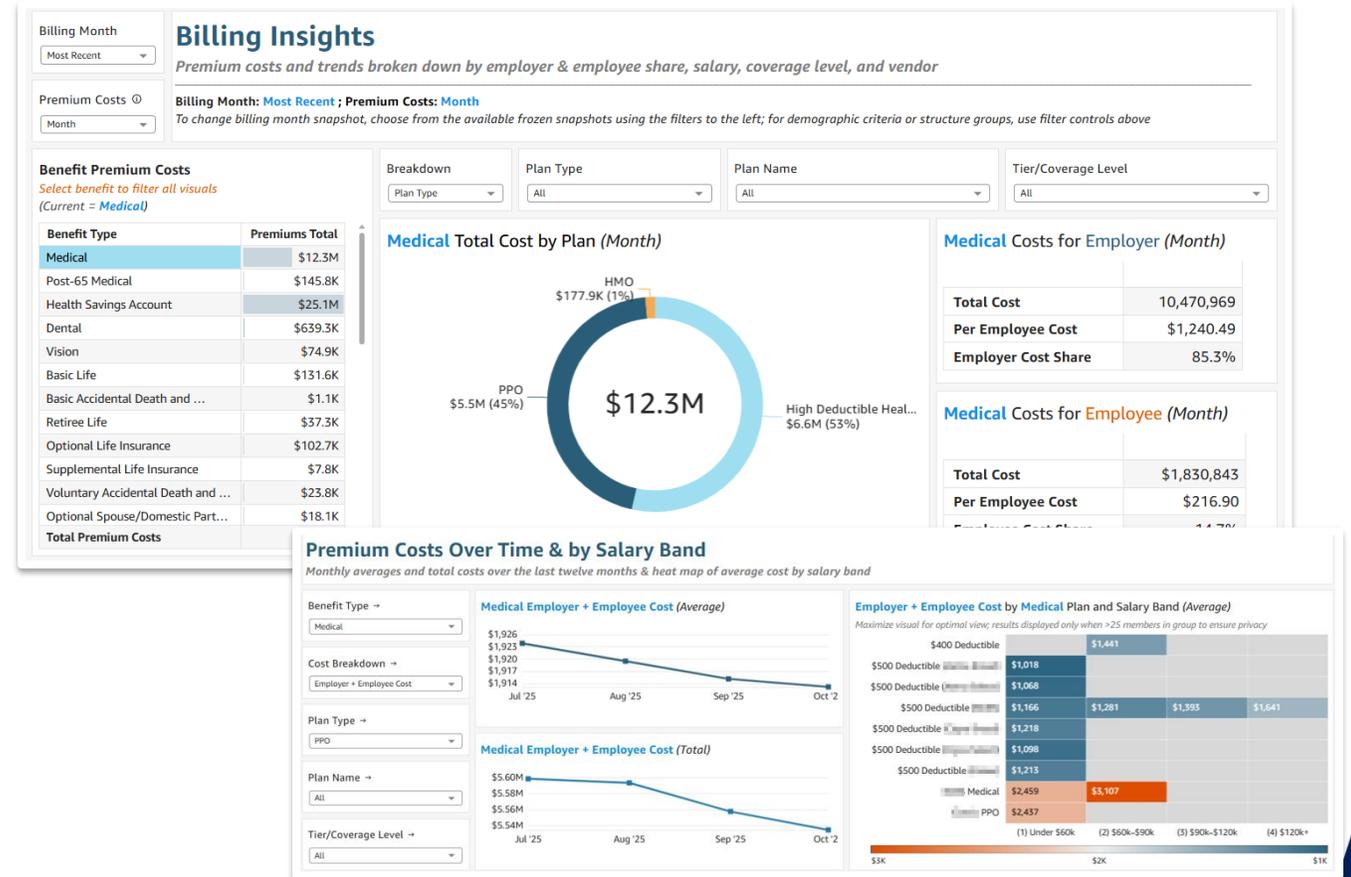
Participation Analytics Tab

- The **Participation Analytics tab** delivers a daily view of benefit program enrollment. You and your client teams can segment enrolled populations into meaningful groups to view breakdowns by specific plan participation, demographic characteristics, coverage levels, and more. You can also filter down to specific plans or plan types to focus on specific enrolled groups.
- This view makes it easy to compare these types of groupings side-by-side, helping to show how plan participation varies across different segments of members.
- Lastly, admins can export summarized data from this dashboard for analysis in Excel or similar tools.



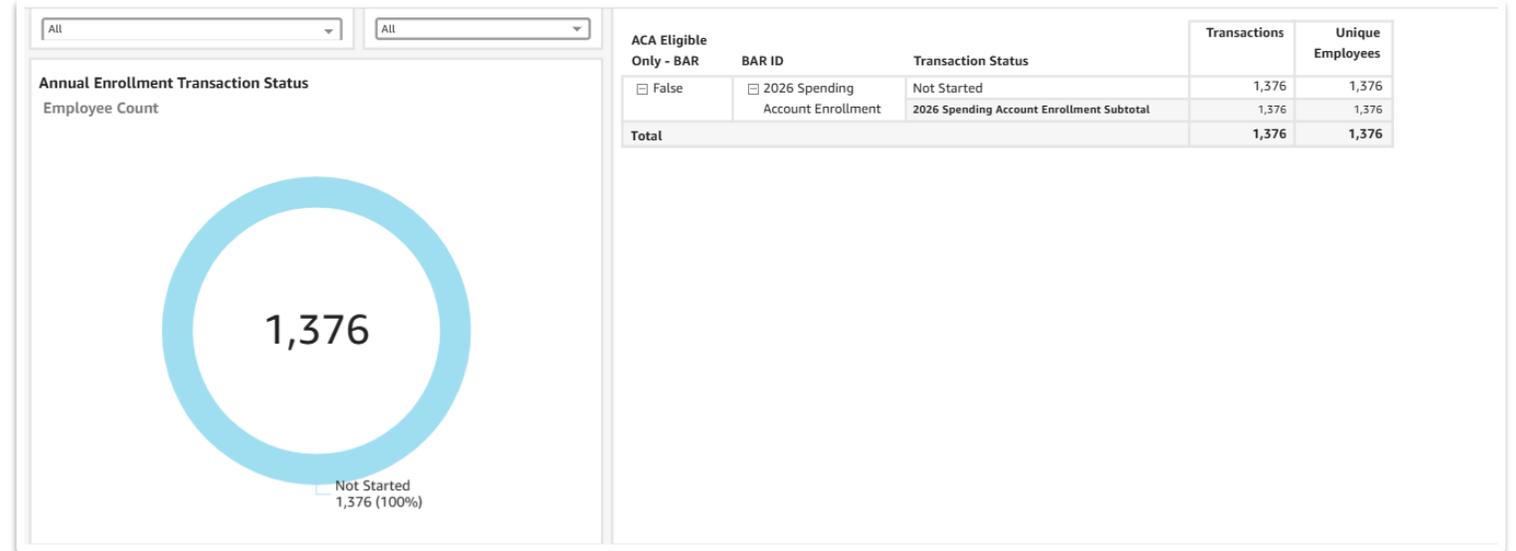
➔ Premium Costs Insights Tab

- The **Premium Costs tab** provides an up-to-date view of total health and welfare premium costs, with the ability to focus on the benefit-type level for deeper insights. You can break down premium data across key population groups—such as plan type, plan name, demographics, and coverage level—and further filter to focus in on specific plans.
- Key performance indicators highlight average and total costs for both employer and employee contributions, along with overall cost share.
- The report also provides tools to explore premium trends over time, analyze average costs by salary band, and review cost patterns by coverage levels and vendors.
- Finally, all underlying data can be easily exported for further analysis or reporting.



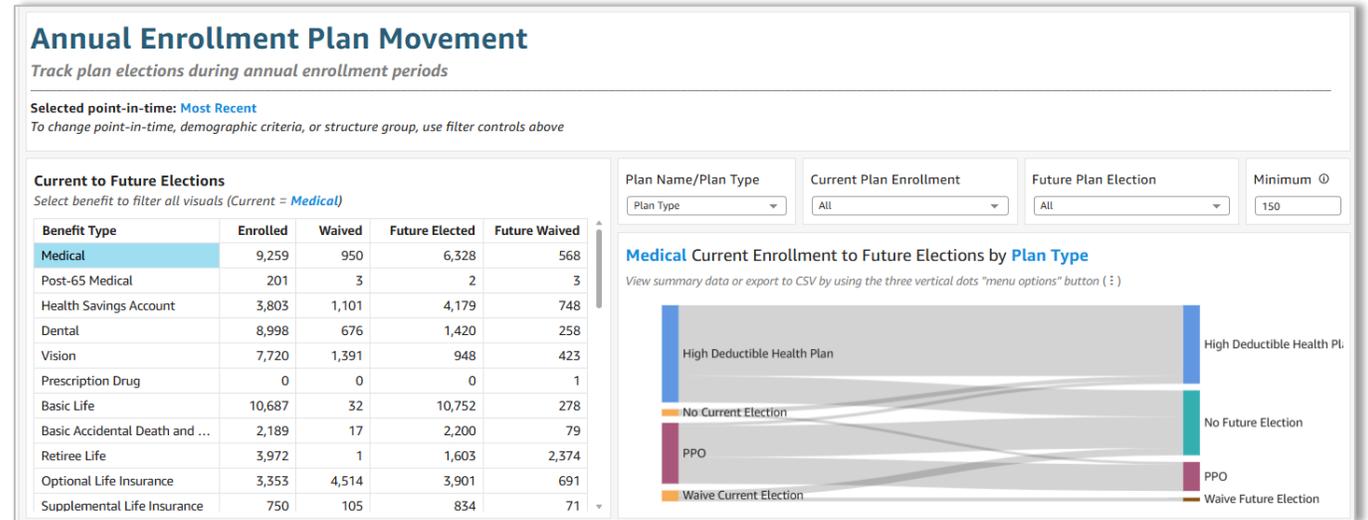
Annual Enrollment (AE) Status Tab

- The **AE Status Tab** showcases the status of your annual enrollment including who has completed their elections, who is still in progress and more.
- This tab is similar to the reporting available today in the AE Analytics Dashboard.



AE Plan Movement Tab

- The AE Plan Movement tab provides annual enrollment analytics designed to highlight what's happening during an active annual enrollment window. You can easily see which plans employees are currently enrolled in or have waived, as well as what they have elected or waived for the upcoming plan year.
- A diagram offers a clear visual representation of plan migration trends, helping admins quickly understand how members shift between plan options year-over-year. This view enhances the current AE Analytics experience by offering filtering functionality, including the ability to focus on specific plan types or plan display names.



Point-in-Time Comparison Tab

- The **Point-in-Time Comparison tab** gives you the ability to compare benefit elections and waives between two specific points in time on a go-forward basis.
- This is especially valuable for clients who are interested in historical reporting and want to understand how participation shifts month-over-month or year-over-year. 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.

Point A ⊕

2025-11-06

Point B ⊕

Most Recent

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): **Most Recent**
 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 Most Recent

Select benefit to filter all visuals (Current = *Medical*)

Benefit Type	Enrolled (2025-11-06)	Enrolled (Most Recent)	Delta Enrolled	Waived (2025-11-06)	Waived (Most Recent)	Delta Waived
Medical	9,237	9,259	↑ 0.2%	1,230	1,483	↑ 20.6%
Post-65 Medical	201	201	→ 0.0%	6	8	↑ 33.3%
Health Savings Account	3,804	3,803	↓ -0.0%	1,433	1,737	↑ 21.2%
Dental	8,978	8,998	↑ 0.2%	905	1,068	↑ 18.0%
Vision	7,704	7,720	↑ 0.2%	1,654	1,846	↑ 11.6%
Basic Life	10,688	10,687	↓ -0.0%	114	375	↑ 228.9%
Basic Accidental Death ...	2,193	2,189	↓ -0.2%	43	111	↑ 158.1%
Retiree Life	3,973	3,972	↓ -0.0%	3	6	↑ 100.0%

Plan Name/Plan Type

Plan Type

Point A Minimum Count

Point B Minimum Count

10 10

Medical Enrollment by Plan Type: 2025-11-06 vs Most Recent

Name/Type	Enrolled (2025-11-06)	Enrolled (Most Recent)	Delta Enrolled
High Deductible Health Plan	5,710	5,716	↑ 0.11%
PPO	3,491	3,507	↑ 0.46%
HMO	36	36	→ 0.00%
Total	9,237	9,259	0.24%





Technology, Powered by *People*

Market Leader in Benefits Technology and Innovation