

## The future of Employee Benefits is here today.

simplybenefits.ca

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## **Industry Pain Points**



### Employer.

- Long, paper-based onboarding (up to 8 weeks)
- All employees need to enroll before they can use
- Paper-based and inefficient admin



### **Employee.**

- Paper forms and enrollment
- Can't use benefits immediately once enrolled
- Claims a hassle (paper/bad tech)
- Plan coverage confusion



### Advisor.

- Paper master applications
- 30-day onboarding
- Long waits for quoting
- Clients unhappy with low-tech
- New tech cutting out advisor



## **Employee Benefits Made Easy.**

Three 100% Digital Portals for Employers, Employees & Advisors.

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≡ Claim	าร	9	
Claims History			
Amount Claimed \$593.52		Amount Submitted \$741.90	
Recent Claims	Date Submitted	Amount Submitted	
	Nov 2, 2021	\$480.00 ~	
<b>Ben</b> Physiotherapy <b>Megan</b> Acupuncturist	Nov 2, 2021 Nov 3, 2021		

MyCard		<b>V</b>	
Carrier No.	Group No. 00000	Certificate No. 000000	
Class Engineering	Division Vancouver	assure	
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■ My Usage	ge 🙁
Your Usage	Ben Walters
Dental	
Combined Max \$2,000.00	\$1,500.00 Remaining 🚺
Routine Care Visits	
1	
Basic Service (Endodonti (Visit and Treatment))	cs, Periodontics, Routine Care
\$157.80	\$1,000.00
Orthodontics	
	\$1,000.00
Major Services (Bridge W Dentures)	Vork, Crowns, Denture Repair,
\$523.00	

## **Industry Leading Digital Claims Payor**



Members submit claims direct or digitally via desktop or mobile app





The Simply Benefits team adjudicates all Health and Dental claims in-house



Members contact Simply Benefits for <u>all</u> claims and questions

48 Hour Reimbursement (via direct deposit) 48 Hour Service Level Agreement 75% First Contact Resolution

### Meet our Administrator Portal.

## **Digital Employee Benefits Administration**

<b>▲ ♀ </b> <u>₩</u> -	SimplyBenefits				<b>₽</b> ¢ -		Simply Benefits			<b>₽</b> ¢
DOWNLOAD Certificate: null	МА	Employees	0	Search	٩		МА	<b>Invoices</b> Current Allocation		View Histor
	Welcome, <b>Marvin Acme</b> marvin.acme+internal@simplybenefits.ca	NOTIFY EMPLOYEES (3) VIEW EMP Filter and Sort	LOYEE CHANGES ③ VIEW PENDING CHANG \$ SA Name	Division Class			Welcome, <b>Marvin Acme</b> marvin.acme+internal@simplybenefits.ca	Overview Div 1	Summary	
Total \$61.73 \$0.00		Class 🗸	Chelsea Liverpool	D: 2 D				Div 2	Previous Month Premium Due	
\$24.69 \$118.77	♠ Dashboard	Status 🗸	paige.latimer+chelsea_liverpool@simplybenefits	DIV Z B	ren :		1 Dashboard		Premium Due Last Month Payment Received	\$8,788.38 \$8,788.38
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0.00 0.00 3.87	📰 Plan Coverage		KH Katherine Howard paige.latimer+katherine_howard@simplybenefit	s.ca			Plan Coverage		Optional Benefits Premium	\$0.00
0.00 9.88	Administrators		TB Tony Baxter paige.latimer+tony_baxter@simplybenefits.ca	Div 1 A	Pen		Administrators		Total Premium For Period Carry Forward	\$8,785.71 \$0.00
0.00	Resources		ML Matt Lee paige.latimer+matt_lee@simplybenefits.ca	Div 2 A	Pen				Subtotal	\$8,785.71
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ificate: null			SS Stacy Seeun paige.latimer+stacy_seeun@simplybenefits.ca						Total Due	\$8,788.38
									This total balance includes any carry forward amoun	t due.
			BARTON Keyes paige.latimer+barton_keyes@simplybenefits.ca	Div 1 A	Live :				Processing Your Payment.	
Total () Help			TH Tim Horton	Div 2 B	Pap :				This summary provides a break down of your current p will be calculated on the last day of the month and ma	



#### **Administrator Portal**

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	Details		<b>Duo:</b> it's you partner, spo
	Last Name Date of Birth (MM/DD/YYY) *		Family: it's y dependents
	Aug 11, 1998 Gender* Female	TIP × Not sure what coverage to select? See below to ensure you are	<b>Definition (C</b> common-law with a perso
	Marital Status * 👻	selecting the appropriate coverage for your household: Solo: it's just you! Due: it's you and a common-law	spouse, but conjugal rela
	Street Address	partner, spouse or child. Family: it's you and two or more dependents.	situations a
	Suite/Unit City/Town Province  Coverage Type Solo	Definition (Common-law): "Living common-law" means you are living with a person who is not your spouse, but with whom you have a conjugal relationship, and to whom at least one of the following situations applies: • They have been living with you in a conjugal relationship for at	<ul> <li>They in a colleast</li> <li>They child</li> <li>They</li> </ul>
TIP If you and/or your dependents are enrolled in another health plan, you can waive your Extended Health Care and/or Dental benefits. If you choose not to Waive, you can coordinate your health plan with your	If you or your dependents are presently covered for Extended Health Care and/or Dental Care benefits under another group contract you may waive coverage for such benefit(s) under this contract. Please select between the following: Waive or Do not waive CONTINUE	least 12 continuous months. They are the parent of your child by birth or adoption. They have custody and control of your child (or had custody and control immediately before the child turned 19 years of age) and your child is wholly dependent on that	They     of you     and c     befor     years

TIP

If you and/or your dependents are enrolled in another health plan, you can waive your Extended Health Care and/or Dental benefits. If you choose not to Waive, you can coordinate your health plan with your dependents to maximize coverage.

X

Once complete, employees can instantly start using their benefits.

#### TIP

Not sure what coverage to select? See below to ensure you are selecting the appropriate coverage

a common-law child.

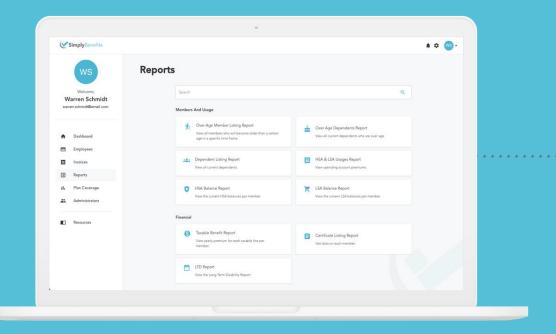
d two or more

on-law): "Living ans you are living is not your vhom you have a hip, and to whom following

- been living with you al relationship for at ntinuous months.
- e parent of your th or adoption.
- ustody and control l (or had custody immediately child turned 19 e) and your child is endent on that upport.

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#### **Administrator Portal**



SimplyBenefits							📌 🏚 -
	Certifica	ate Listi	ng				DOWNLOAD
AD	Gordon, Barbara	5					Certificate: null
Welcome, Addy Demo	Status Late Applicant	Class A	Division Div 1	Province British Colu	Notes mbia None		
addy.demo123+march15@gmail.com	Benefit	Volume	Premium	Adj.	GST/HST	PST	Total
	HSA	family	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	LSA	family	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dashboard	Optional	12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Misc		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employees	Subtotal		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$ Invoices							
→ Reports	Grayson, Richard						Certificate: null
	Status	Class	Division	Province	Notes		
Plan Coverage	Late Applicant	А	Div 1	British Colu	mbia None		
6 Administrators	Benefit	Volume	Premium	Adj.	GST/HST	PST	Total
	HSA	solo	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Resources	LSA	solo	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
. 676	Optional		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00 () Help
	Misc	12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## **The Reporting Difference**

Real-time reports available in Administrator Portal:

- Over Age Member and Dependent Listing
- Benefits Usage by Member
- HSA & LSA Balance
- Taxable Benefits
- Certificate Listing
- Long Term Disability

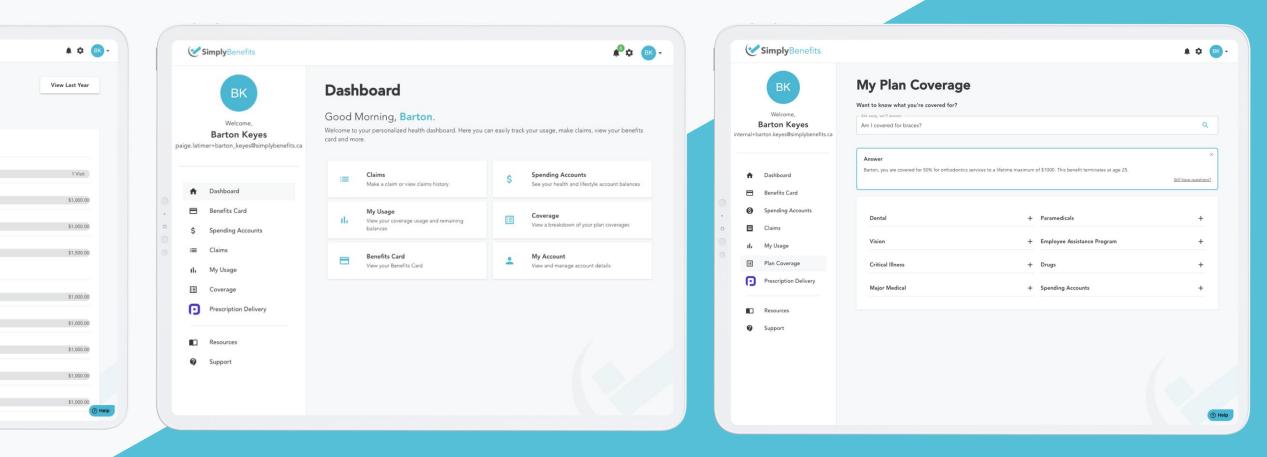


## Whitelabel Your Portal.

⊘MA	PLEAIRWAYS			🌲 🌣 SB	≡ My Usage	e
	SB	Benefits Ca	rd	DOWNLOADABLE PRINTABLE VERSION	Your Usage Simple Si	ally
Sim	Nelcome, <b>nple Ben</b> pen@gmail.com		MyCard 🔗		Dental Combined Max \$2,000.00   \$1,500.00 Remaining	•
			Carrier No.         Group No.         Certificate No.           00         00000         000000		Routine Care Visits	
	hboard efits Card		Class Division ASSURE		Basic Service (Endodontics, Periodontics, Rou (Visit and Treatment)) \$157.80	utine Car \$1,000.0
Spei	nding Accounts		Simple Ben Simply Benefit	5	Orthodontics	\$1,000.
	Usage				Major Services (Bridge Work, Crowns, Dentu Dentures)	
1.00	a Coverage		Emergency Travel Assist Prescription Drug Card		S523.00 Paramedicals	\$1,500
	ources		24/7 medical service while traveling.         For use in Canada only. Pharmacy Call           Please call within 48 hours for direct         Centre Services provided by Assure.           billing.         1-800-000-0000		Combined Max \$2,000.00   \$1,500.00 Remaining Speech Therapy	\$1,000
-	port		Internationally 1-800-0000 Simple Ben Simply Benefit		Social Worker	. ,
					so Registered Dietician	\$1,000
				*	\$207.40	\$1,00

## Member Portal and Mobile App

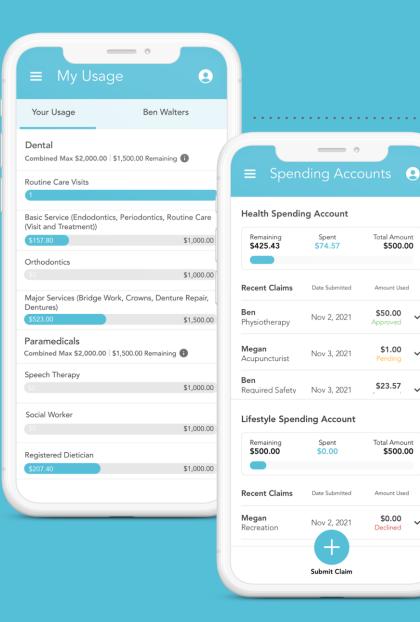
Meet our Member Portal - A Seamless Employee Benefits Experience



Available on the App Store

Get IT ON Google Play

#### **Member Portal**



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# Why We're Better Usage Tracking

# Easily view all benefits usage in one place

- Total amounts used and remaining for the member and each dependent
- Totals broken down by each benefit

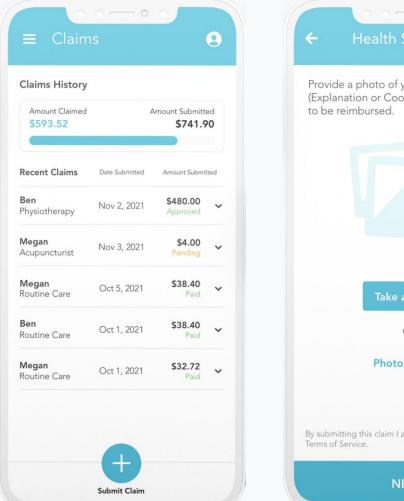
### **Health & Lifestyle Spending Accounts**

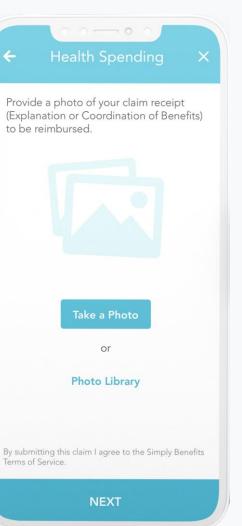
 Health and Lifestyle Spending Account claims submitted with balances

#### **Member Portal**

### Why We're Better

## **Claims, Simplified.**





## **Easy Digital Claims Submission**

## **\$ One-Click Spending Account Top Up**

## Ct Fa

### **Fast & Direct Reimbursement**



**At-a-Glance Claims History** 

Why We're Better

## **Al and Automation**

## **Coverage Lookup with AI**

Sophisticated AI-search tool for members to ask questions and get simple answers.

## **Automated Booklets**

Comprehensive plan coverage details for members.

ВК	My Plan Coverag	e		
Welcome,	Want to know what you're covered for?			
Barton Keyes ternal+barton.keyes@simplybenefits.ca	crowns			٩
Dashboard	Answer Barton, crowns are considered a major ben maximum of \$1500 with all major services.	efit which your plan covers 809	% of the service cost to a combined	× Still have ouestions?
Benefits Card     Spending Accounts				
Claims	Dental	+	Paramedicals	+
II. My Usage	Vision	+	Employee Assistance Program	+
Plan Coverage	Critical Illness	+	Drugs	+
Prescription Delivery	Major Medical	+	Spending Accounts	+
Resources				
Support				
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	ļ			
nswer				×



# For Advisors

Contemporation SimplyBenefits	<i>₽</i> ≎ ∞	SimplyBenefits	æ*
Welcome, Warren Schmidt warren.schmidt+internal@simplybenefits.ca	<b>Dashboard</b> Good Afternoon, Warren. Welcome to your personalized health dashboard. Here you can easily build quotes, track your clients, view commissions and more!	WS Welcome, Warren Schmidt warren.schmidt+internal@simplybenefits.ca	Plan Design Dashboard > Quotes > Test Company > Plan Design ← Build a Quote View Revisions
<ul> <li>n Dashboard</li> <li>Quotes</li> <li>⊘ Pending Accounts</li> <li>✓ Active Accounts</li> <li>⊘ Commissions</li> <li>n Resources</li> </ul>	<ul> <li>Curtical the quoting process for your accounts.</li> <li>Chrive Accounts</li> <li>Curtical Accounts<th><ul> <li>Dashboard</li> <li>Quotes</li> <li>Pending Accounts</li> <li>Active Accounts</li> <li>Commissions</li> <li>Resources</li> </ul></th><th>Class: A   DESIGN 1     Life Insurance     Please select between the following:   Flat Amount   or   Times Earnings   Please complete the following:   S0.00   S0.00     Reduces at Age   S0.00%     Reduces at Age   S0.00%   Reduces at Age   S0.00%     Please select the items you would like included (Optional):     Accidental Death &amp; Dismemberment     Plase complete the following:     Classify Detiod (Montha)     - Minimum Hours per Week     - Termination Age</th></li></ul>	<ul> <li>Dashboard</li> <li>Quotes</li> <li>Pending Accounts</li> <li>Active Accounts</li> <li>Commissions</li> <li>Resources</li> </ul>	Class: A   DESIGN 1     Life Insurance     Please select between the following:   Flat Amount   or   Times Earnings   Please complete the following:   S0.00   S0.00     Reduces at Age   S0.00%     Reduces at Age   S0.00%   Reduces at Age   S0.00%     Please select the items you would like included (Optional):     Accidental Death & Dismemberment     Plase complete the following:     Classify Detiod (Montha)     - Minimum Hours per Week     - Termination Age

Advisors are benefits experts and important to helping you make wise decisions.

### What's Next?

## **Optional Benefits Without The Hassle**

- Members purchase optional benefits online in minutes.
- Premiums withdrawn directly from member's bank - NO employer involvement or payroll deduction.
- After purchasing, member can view coverage and download monthly transactions.

Life Insurance	0	
Select your coverage am in \$10,000 increments.	nount. Coverage is available	
\$10,000	\$1,000,000	
Life Insurance Total		
Coverage Amount	Monthly Cost	
Accidental Death	0	
Critical Illness	0	
Total	<b>\$0.00</b> /month	

Life Insurance	Accidenta
Megan Walters	Megan Walte
Spouse Coverage	512.50 Spouse Cove
Total \$2	5.00 Total
⊱ Coverage with Empire	.ife 🦻 Coverage
MORE DETAILS	MOR
	**
Transaction His	tory
View and download ind monthly payment.	ividual receipts for each
HIDE TRANSA	
August Optional Benef August 1, 2021	ts \$52.60 Pending
July Optional Benefits July 1, 2021	\$52.60 Paid
June Optional Benefits	\$52.60 Jaid

≡ Optiona	Benefits	8
Optional Benefits Coverage		
Life Insurance		Accidental De
Megan Walters	\$12.50	Megan Walters
Spouse Coverage	\$12.50	Spouse Coverage
Total	\$25.00	Total
🏀 Coverage with Empire Life		🥼 Coverage with E
Life Insurance		×
Member	Coverage	Monthly Fee
Megan Walters	\$10,000.00	\$12.50
Spouse Coverage	\$10,000.00	\$12.50
Total		\$25.00/month
Coverage Details		
Sociis eget auctor t dolor mattis. Tortor purus amet pulvina	egestas habita	
• Sed senectus lea	o egestas sapie	n. Ullamcorper

- Sed senectus leo egestas sapien. Ullamcorpe iaculis venenatis aliquam ullamcorper.
- Quam facilisis nisi, dictum metus phasellus orci, commodo elit id. Nec aliquet tellus ac faucibus.

Visit Empire Life's Website. 🔀

<u>1-888-0000</u> 📞

**Coming Summer** 2022



## **Our Value Proposition**

Engage. Simplify. Evolve.



Employees Anytime, Anywhere.



**Simplify** the Benefits Experience.



**Evolve** Your Benefits Business.





## Contact Us.

## www.simplybenefits.ca

Email: sales@simplybenefits.ca

Phone: 1-877-815-7751





# Thank you!

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