

# The flexible benefits platform checklist



## One platform. Ultimate flexibility.

Selecting the right partner is key to realizing the full advantages of a unified benefits platform for your pre and post-tax benefits. Use this checklist to select a reliable, long-term benefits partner.

### Modern tech

Ensure the system is natively built to seamlessly consolidate benefits administration and usage.

- Configurability to administer both tax-advantaged and post-tax benefits
- UI / UX that meets today's standards with desktop access and mobile application
- Easy to train and intuitive for users
- Ability to personalize the platform per user and company
- Localized currency conversions and translations for global programs
- A single digital card for Pre-tax Accounts, and a single card for all LSAs
- A marketplace with products/services worldwide that automatically considers your program's criteria
- The ability for direct deposit so employees receive reimbursement quickly
- A backend that's managed by the provider, not by a third-party (for quick fixes when needed)
- Ability to automatically integrate with your other HRIS systems
- WCAG 2.1 certified to support accessibility and inclusion of all employees
- Analytics engine and dashboard to monitor engagement and utilization

# The flexible benefits platform checklist (cont'd)

## Quality support

Find a provider that offers high-touch support and acts as a strategic advisor.

- Dedicated contact who helps with day-to-day needs and guidance
- 24/7 global support for employees via chat, email, and phone
- Quick response time - within 24 hours - to process claims and address user requests
- Robust knowledge center for employees/admins to easily access support

## Compliance

Dedicated team members who provide guidance on designing compliant benefit programs.

- Knowledge of Lifestyle Spending Accounts and Pre-tax Account tax requirements
- Creates plan documents and summary plan descriptions for your company
- Non-discrimination testing (NDT) that's simple to execute and focused on recommended actions

## Security and privacy

Rigorous protections and compliance certifications are a must to safeguard sensitive employee information.

- Uses global standards such as GDPR for privacy
- Annual audit for SOC 2 Type II that is available upon request
- Practices HIPAA security and privacy compliance for relevant accounts (e.g., FSAs, HRAs)
- SSO configuration capabilities that work with a multitude of providers, such as Okta, OneLogin, Google, and Microsoft Azure

