

MAXWELL FOR EMPLOYERS: PLATFORM OVERVIEW

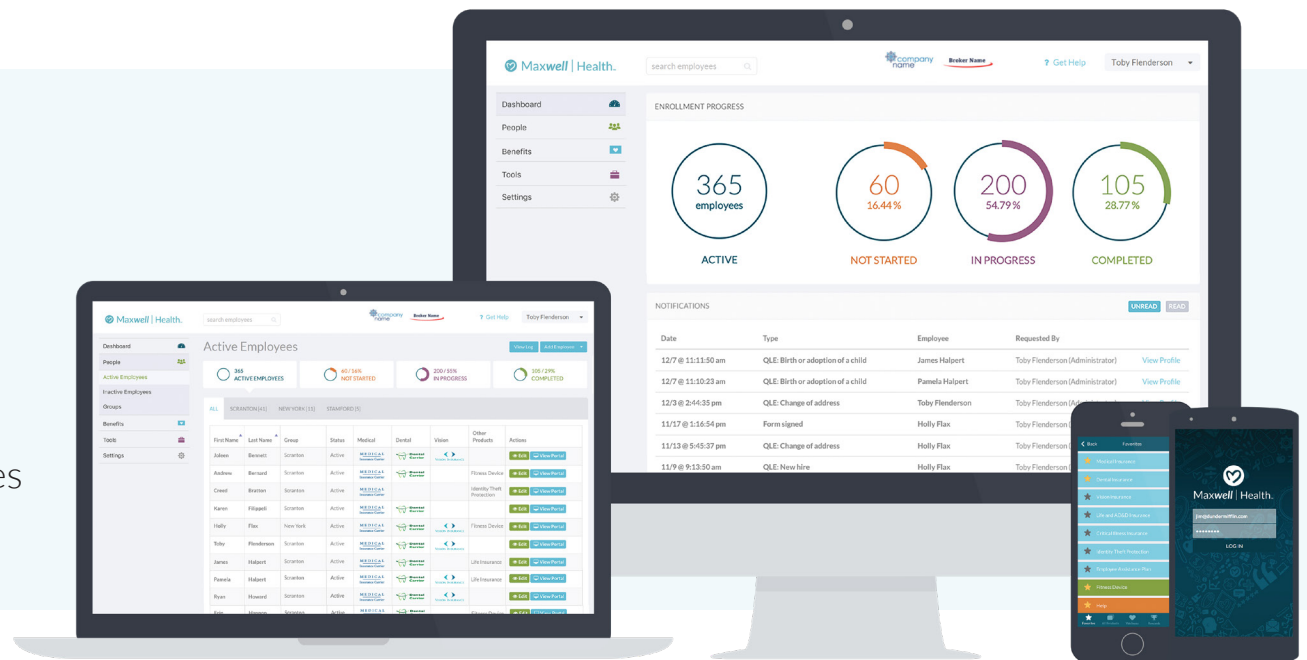
Maxwell provides an easy-to-use technology platform that acts as your HR command center, making it simple to manage employee information and benefits.

ONGOING EMPLOYER SERVICES AND SUPPORT

- › Deployment Support
- › Technical Support
- › Webinar Training
- › Knowledgebase Access
- › Renewal Support
- › Access to Preferred Lifestyle and Financial Benefits

CORE PLATFORM FEATURES

- › Online Enrollment
- › Year-round Engagement
- › Paperless Administration
- › HR Functionality
- › Integrations
- › Support for Robust Benefits Strategies
- › Maxwell Marketplace



HIGHLIGHTS

With Maxwell, you no longer need to source stand-alone solutions for the most complex benefits and HR tasks. Maxwell has built in these valuable highlighted features to save you time and money.



Payroll

- › Payroll-relevant changes to demographic and deduction information during a defined period of time. You'll be able to quickly see everything you need to know to update payroll, and can download the view as a changes-only payroll file.
- › An intuitive payroll calendar makes it easy to enter your company's payroll schedule and ensure accurate deductions are made for financial products.
- › Customizable cost reports allow you to pull a full file of your employees' benefit cost data at any time — however you'd like to view it.



Forms and Documents

- › Streamlines the previously time-consuming, manual process of managing employment and enrollment paperwork, and eliminates the potential for human error
- › Forms are conveniently pre-populated and electronically signed via DocuSign by you and your employees, all within your Maxwell workflow
- › Document management also makes it so that SBCs and employment documents like I9s, W4s, Direct Deposit Forms, and more, can be made available to employees throughout the year



COBRA

- › When a COBRA-qualifying event occurs, you're guided through the relevant steps, including the option to indicate which products are eligible for continuation of coverage.
- › COBRA event report pulls a list of employees and dependents who became eligible for COBRA coverage due to a life event. And just like that, you'll have a file you can use to easily transfer COBRA event information over to your administrator — whoever they are.



Census Management

- › Houses all employee data, eliminating the headaches of onboarding and managing changes throughout the year
- › Cloud-based system of record means no more sharing spreadsheets and having to worry about the completeness of your data: simply edit it online and employees can update their own demographic information (with your approval)



Benefits Enrollment

- › Open enrollment management and processing
 - Eliminates need to ask employees individually where they are in their enrollment process or search through email to see who has completed what
 - Live enrollment dashboard allows you to track benefits enrollment in real-time and easily send email reminders to employees
- › Life events and benefits rules
 - Configurable notifications mean the right people on your team, or outside vendors, are always in the know about mid-year employee changes
 - Easily administer benefit changes based on life events
 - Manage benefits rules, such as product type dependencies



Reporting

- › Provides insight into your employee data, via a robust reporting dashboard that's customizable for your needs
- › Includes change reports, custom reporting, cost reports, benefits cost reports, and more



Communications

- › Standardize your benefits communication with a library of beautiful, pre-built email templates
- › Create, save, and send customized emails out to employees



Employee Mobile App and Wellness Program

- › An engaging mobile app gives employees access to their benefits and information wherever they are, in a way that's convenient for them
- › Turnkey wellness program allows you to reward employees for being active, by syncing with industry leading fitness devices via the mobile app



Onboarding

- › Makes the process of starting at a company smooth for new hires, including benefits enrollment and review or approval of employment documents



Integrations / Data Feeds

- › Payroll Data Feeds
 - Integration and reporting capabilities with top payroll vendors



- › Other third-party Integrations
 - Securely send information to other third-parties such as vendors for financial products (HRA/HSA/FSA), ACA compliance partners, and HRIS



- › Enrollment Feeds
 - Convenient, full-service and automatic enrollment data feeds with carriers for processing open enrollment, mid-year changes, and renewals ([including free connections with preferred carrier partners](#))



Employee Shopping Experience

- › Beautiful, simple enrollment experience makes it easy for employees to shop for benefits in a whole new way, enrolling in both insurance and lifestyle / financial products, totally paperlessly
- › Saves you time by not having to answer simple benefits questions or check eligibility on product offerings per employee
- › Makes it easy for employees to compare plans, review choices, and check out — just like shopping online for the things they love
- › Also makes it easy for employees to manage ongoing benefits changes throughout the year

FULL PLATFORM OVERVIEW

What you get:

ONGOING EMPLOYER SERVICES AND SUPPORT

Deployment Support:

- › Maxwell's Implementation team works with your broker to ensure a timely and accurate deployment of your specific benefit plans, rates and contributions. This results in high-quality data in the system and a smooth enrollment experience for your employees.

Knowledgebase Access:

- › Self-serve for helpful platform tutorials, training modules, and technical documentation.

Webinar Training:

- › Convenient introductory and task-oriented webinar trainings keeps you up to speed on how to:
 - Manage enrollment information, including processing new hires and annual open enrollments
 - Manage employee changes, including processing changes and terminations

Technical Support:

- › Live technical support for HR administrators and employees from our friendly and helpful US-based team, available 8am-8pm Eastern, Monday-Friday

Updates After Going Live:

- › Whether you have a slight modification to your rates or contributions at renewal, or a total overhaul on your strategy, Maxwell's Implementation team works with your broker to ensure a successful benefits renewal so that your platform is refreshed and ready for open enrollment.

Access to Preferred Lifestyle and Financial Benefits:

- › Easily offer lifestyle and financial-focused benefits as value-adds for your employees, at a low cost and low level of effort to set up and administer. Products include telemedicine, identity theft protection, and health concierge services.

CORE PLATFORM FEATURES

Employee Experience



ONLINE ENROLLMENT

- > Employee engagement
- > Plan comparison
- > Flexible plan display
- > Beneficiary designation
- > Mid-year changes



YEAR-ROUND ENGAGEMENT

- > Mobile app
- > Configurable support options
- > Access to plan details
- > Access to convenient health tools and services
- > Turnkey wellness and rewards program

Benefits Administration and HR



PAPERLESS ADMINISTRATION

- > Online benefits management
- > Simple new hire on-boarding
- > Electronic form-signing
- > Document sharing
- > Email communication



HR FUNCTIONALITY

- > Open enrollment
- > People management
- > ACA reporting capabilities
- > Robust reporting
- > Notifications
- > Built-in permission levels



INTEGRATIONS

- > EDI connections with ancillary and medical carriers
- > Payroll integration and reporting capabilities
- > Health Equity and Discovery Benefits integrations for Section 125 products
- > BambooHR integration
- > Wellness and lifestyle integrations



SUPPORT FOR ROBUST BENEFITS STRATEGIES

- > Traditional and nontraditional benefits
- > Complex ancillary plan structures
- > Complex rate structures
- > Complex contribution strategies
- > Eligibility groups



MAXWELL MARKETPLACE

- > Extensive suite of procured ancillary products
- > Nontraditional, value-add lifestyle and financial products
- > [See full list of carriers and vendors](#)