



August 7, 2024

PLANSOURCE

OPEN ENROLLMENT RENEWAL STATEMENT OF WORK

This Statement of Work for Open Enrollment Renewal Services (the "SOW") is effective as of the SOW Date listed below ("SOW Effective Date") and is between PlanSource Benefits Administration, Inc. ("PlanSource") and Client Name listed below. Notwithstanding any other agreement between the parties, this SOW is governed by the terms of the End User Services Agreement located at <https://plansource.com/eusa-agr> (the "Agreement"). All capitalized terms used but not defined herein have the respective meanings given to them in the Agreement. Unless expressly modified herein, all terms of the Agreement remain unchanged and in full force and effect. If there is a conflict between this SOW and the Agreement or any Prior Agreement, the SOW will control regarding the subject matter herein.

This SOW provides the details for the scope, pricing, delivery of plan renewal services PlanSource will deliver to End User based on the Renewal Type End User elects below (End User's annual benefit plan renewal is referred to as a "Renewal" and PlanSource's services under this SOW are collectively referred to as the "Renewal Services") and ongoing support as provided herein. The success of any Renewal is contingent upon each party fulfilling their respective responsibilities within the mutually agreed upon timeline for the open enrollment style elected. End User's failure to fulfill its responsibilities in this SOW may result in additional fees, activation delays and rescheduling of your open enrollment period.

Client Name:	Johnson County of Texas
Type of Project:	OE Type 1

Customer Contact:	Laura Baxter <i>Randy Gillespie</i>
SOW Date:	7/22/2024
Description of work:	
Standard Renewal	

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Estimated Total Timeline:	4 Weeks
Items to be Completed by the Client:	
<ul style="list-style-type: none"> • Participate in Guided Renewal Training <ul style="list-style-type: none"> • Learn how to identify if plans selection(s) are supported by Partner Marketplace • Sign the Timeline Acceptance Form • Use Guided Renewal Tool to: <ul style="list-style-type: none"> • Specify enrollment dates • Specify active or passive enrollment • Confirm if there is a change to the carrier file or mark "No Change" as applicable • Input all rate changes, including confirming Marketplace plans and/or rates as needed • Validate all changes • Perform Testing • Copy coverages for passive enrollment • Fully complete all steps of Guided Renewal Tool • Update page content (if applicable) and • Update document library (if applicable) • Sign the System Sign-off 	
Items to be Completed by PlanSource:	
<ul style="list-style-type: none"> • Provide Guided Renewal Tool training via PlanSource University. • Extend payroll schedule and carrier billing into new plan year. • Verify Partner Marketplace plan, rate(s), and page content set-up (if applicable) and sign-off that all tasks are complete prior to customer testing. • Provide testing scripts. • Assist with action items for any existing HCM/API Integrations or EOI Plug-Ins. • Recalculate salary-based benefits after benefit salary import. • Notify EDI team of any file changes and confirm proper identification of Partner Marketplace files. 	
Data Conversions	
<ul style="list-style-type: none"> • Importing passive elections for new carriers or plan changes will be at \$175.00 per hour and a separate Statement of Work (SOW) will be provided detailing the number of expected hours. 	
Out of Scope Services	
<ul style="list-style-type: none"> • In addition to the fees in this Order Form, PlanSource will charge an out-of-scope fee of \$175 per hour for any services or additional resources not outlined herein. The amount of time required for out-of-scope services is determined based on the project's scope. Additional fees may apply based on project complexity. PlanSource will invoice any out-of-scope fees in the month following the month in which PlanSource provides the services. Out of scope fees are payable upon receipt of an invoice 	
Carrier Integrations	
<ul style="list-style-type: none"> • HR, Payroll, API, Carrier, and other integrations are not included with Open Enrollment renewal and is subject to additional fees. 	
https://plansource.com/wp-content/uploads/2023/05/2023-Pricing-Sheet-Update_EDI-and-OE.pdf	

Please note that a separate Statement of Work will NOT be provided for carrier integration files

Estimated Biliable Hours	
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Product	Quantity	Price	Price Per Unit Basis	Frequency	First Billing Month
OE Renewal	1.00	USD 1,000.00		One-Time	August 2024
TOTAL:					USD 1,000.00

Estimated Cost:	USD 1,000.00
Anticipated Completion Date:	8/19/2024

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In order to complete the requests in this document, PlanSource may be required to make systemic changes to End User's database, as outlined herein. End User is responsible for carefully testing the results of any changes for accuracy within 10 days of the anticipated project completion date provided by PlanSource (the "Acceptance Period"). If during the Acceptance Period, End User identifies any defects or unintended results, End User must immediately notify PlanSource in writing (the "Defect Notice"), and PlanSource within 30 days of receipt of the Defect Notice, will correct the specified defect(s). If PlanSource does not receive a Defect Notice from End User within the Acceptance Period, PlanSource will assume there are no defects and will consider all data accurate and final. If PlanSource receives a Defect Notice from End User after the Acceptance Period, PlanSource will correct the defect(s) and bill End User at the hourly out of scope fee herein. PlanSource will not be responsible for any losses, liabilities, or expenses incurred by End User resulting from End User's or any of its any of its respective employees, agents, or representatives (collectively, "Authorized Users") failure to follow the requirements set forth herein. The anticipated project completion date is dependent on End User successfully completing all its responsibilities in this SOW and subject to change if End User does not complete such responsibilities.

By signing below, End User certifies that except as otherwise set forth herein, all End User Data and other requested information End User or any Authorized User provides to PlanSource for the Renewal Services is complete and accurate. End User acknowledges that PlanSource is under no obligation to review, edit, censor, control, or question the completeness or accuracy of any End User Data, and is not responsible for any losses or expenses that arise from End User's submission of incorrect, incomplete, or untimely End User Data. PlanSource, in its sole discretion, may charge the hourly out of scope fee herein to fix End User's incorrect, incomplete, or untimely submission of End User Data. Plansource will not be in breach of this SOW if it cannot take corrective action because End User does not agree to pay such out of scope fee.

Each party is signing this SOW on the SOW Effective Date by that party's authorized representative's signature, representing that it has read this SOW, understands it, and agrees to be bound by it.

Signature: 
Name (Print): ~~Laura Baxter~~ Randy Gillespie
Title: Personnel Director