

APRIL 22, 2020 UPDATE

In an effort to continue to help our customers during this difficult time we are excited to share a new offering. As many employees are forced to work remotely for the foreseeable future, companies need a way to communicate with at-home or on-the-go employees. Since staying connected with employees is so important right now, and text messaging offers additional convenience to the even-more-than-normal distributed workforce, PlanSource will be offering email and text messaging communications at no charge to customers through the end of the year.

HR leaders can use this technology to keep employees informed about office or plant closures, updated safety protocols, and work schedules that are changing by the minute. They can also remind employees how to use critically important benefits, such as telemedicine and Employee Assistance Programs that provide free and confidential video and phone-based mental health and substance abuse counseling.

[Read this blog](#) to learn more about this special offer.

The good news, there is no action needed on your part to access this free feature. We have turned this on for PlanSource customers. If you have questions on how to use the feature, please reach out to customer support.

MARCH 27, 2020 UPDATE

Together, we are facing a truly unprecedented situation. The global Coronavirus pandemic is affecting all of our families, our businesses and our communities. Employee benefits and access to healthcare is more important than ever, and our top priority remains serving our customers and partners while ensuring the safety of our employees.

In an effort to continue to provide our customers and partners with important updates as the global situation evolves, we'd like to share a couple of changes with you. This week, Orange County, Florida announced a stay-at-home executive order that is in effect from March 26th – April 9th. Accordingly, PlanSource has transitioned all employees in the Orlando office to a mandatory work from home status. We don't anticipate any service disruption to our customers as a result of this change.

Secondly, after a detailed review by PlanSource leaders from Info Security, Legal & Compliance, Operations, Human Resource, IT Services, and Vendor Management, we have approved working from home at all our locations. The transition to work from home has taken place over the past two weeks and has gone smoothly, with no service disruption. We have implemented additional requirements for each location's physical and internet connectivity to further safeguard your information.

Lastly, given that many of our customers are now working from home as well, we know it may be difficult to get into the office to print checks. As such, we are providing several other options for providing your payment to PlanSource: ACH Debit, ACH Credit or Wire Transfer, or paper checks to a lockbox. You will receive a communication from PlanSource with instructions for changing your payment method, if desired. Some of you have asked about a credit card option. We don't have a credit card option yet; however, we are working on this and will let you know as soon as this is available.

We hope you and your families are staying healthy. We appreciate you and value your business. If you have any questions please don't hesitate to reach out to covid19taskforce@plansource.com.

Thank you,
The PlanSource Team

MARCH 12, 2020 STATEMENT ABOUT COVID-19 PREPAREDNESS

As you are all aware, there's an evolving public health concern regarding the novel COVID-19 spreading in the United States. We have been following updates closely and discussing our action plan as a team to support our employees' health and safety, provide the required support to our customers and also monitor its economic impact.

PlanSource has 3 guiding principles as we continue to move forward:

1. Keep PlanSource employees safe.
2. Continue to serve PlanSource customers and partners with the highest standards.
3. Do our part to slow community spread of the virus where there appear to be outbreaks so that the most vulnerable people are able to get the care they need.

We have created a COVID-19 task force team that consists of members of our leadership team. This team will be responsible for communications, response and monitoring this evolving situation. We encourage you to continue to monitor reputable sites for the latest information, such as the [CDC](https://www.cdc.gov) and [WHO](https://www.who.int).

WHAT ARE WE DOING FOR PLANSOURCE EMPLOYEES?

Travel Guidance:

Effective immediately, we are suspending ALL business travel for PlanSource employees.

As a result:

- All meetings that involve travel must instead be conducted virtually.
- All employees will limit face-to-face meetings including internal meetings (specifically large meetings even in our offices) and promote virtual meetings as much as possible.

We are not closing any PlanSource offices at this time but are providing the following guidance:

- All PlanSource employees have laptops and have the technology and option to work remotely. We are asking all PlanSource employees to take laptops home with them each day in the event they need to begin working remotely. PlanSource has optimized our systems and technology so that remote work is effective.
- In addition, employees who have symptoms of cough, fever or flu have been asked to stay home and not come to work until they are free of fever and other symptoms for at least 24 hours. Preventive practices in the workplace contribute to a healthy, productive office environment. We are taking extra precautions in all PlanSource locations as well to ensure a clean and safe work environment.

WHAT ARE WE DOING TO PREVENT DISRUPTION TO CUSTOMERS?

We do not expect any disruption in service to our customers at this time. All operational employees are currently testing their technology to ensure that they can be 100% productive to work remotely. This testing will be completed by March 13th. The information below highlights our business continuity plan in preparation for a pandemic.

According to our business continuity plan, PlanSource will appoint a Pandemic Coordinator. For COVID-19, PlanSource has proactively appointed Jagdish Chugani, VP of Human Resources as our Pandemic Coordinator.

The majority of the operational workforce is distributed fairly equally between the Salt Lake City, Utah and Orlando, Florida offices, which, combined with VPN access

from home provides the ability to redistribute most tasks geographically and/or outside of normal office facilities.

Impact on Employees and Customers

Public transportation closures are expected to have minor limited impact due to low utilization. Quarantines or other community containment measures will be addressed via existing mechanisms for remote work from home (internet and VPN access to systems). Employee access to healthcare is good via solid provider networks available through the PlanSource medical insurance plan.

Policies to be implemented during a pandemic

- Working from home (or alternate locations) will be directed by each departmental manager and coordinated via the Pandemic Coordinator, minimizing (or eliminating as required) the need for in-office employees.
- Policies to prevent influenza (or other diseases) spread at the worksite will be implemented as needed in accordance with government directives that arise at the time.
- Initiation and termination of the pandemic response plan will be determined by the Executive Management Team.

Employee Communication and Education

The Pandemic Coordinator will direct each office facility to provide the following:

- Materials covering pandemic fundamentals, protection, and response strategies.
- Coordinate general communication for those at work as well as those working from home (or not currently able to work).
- Identify community sources for up to date pandemic information.

Coordination with External Organizations

The Pandemic Coordinator will collaborate with the following agencies as appropriate:

- Medical insurer and health plan
- Major local healthcare facilities
- Federal, state, and local public health agencies and emergency responders

We appreciate your partnership as we seek to minimize risk and ensure positive outcomes for our employees, their families and our customers. If you have any questions or concerns please email covid19taskforce@plansource.com.

Thank you,
The PlanSource Team