



with



PLATFORM & INTEGRATION OVERVIEW

Maxwell Health is a fully paperless operating system for employee benefits that streamlines online enrollment in all types of benefits.

- › Merges benefits administration and private exchange technology
- › Reinvents the benefits shopping experience
- › Mobile app to engage employees throughout the year (not just open enrollment)
- › Comprehensive health care and health engagement platform
- › Acts as “Passbook”: one place employee goes for everything health-related

Platform details:

- › Self-serve online benefits enrollment for employees
- › Ability to keep your current broker
- › Ability to keep your current insurance provider(s)
- › Real-time dashboard gives you a 30,000 foot view of employees as they move through open enrollment
- › Supports all benefits, including medical, dental, vision, life insurance, short- or long-term disability, 401(k), and other voluntary benefits
- › Supports different contribution strategies, including defined contribution and defined benefit
- › Built-in, paperless form-signing that pre-populates employee information
- › Direct connections to both medical and ancillary insurance carriers for safe transmittance of employee data
- › Built-in communications give you the ability to send individual or bulk messages, save templates, and track opens and click-through rates
- › Beautiful and engaging employee experience during enrollment and afterwards
- › Lifestyle-based packaging of benefits is intuitive and gets rid of the typical “decision exhaustion” of the past, with more refined decision support at key points of the process
- › Health engagement platform connects with the most innovative and effective health products available

Integration with BambooHR:

- › During our first step of data gathering, all you have to do is:
 - create and give us your API key from BambooHR
 - give us your BambooHR URL
 - automatically sync down your employees and put them into the different benefit groups you set up on Bamboo, within Maxwell Health. These groups determine which benefits you offer to that group. Select which field you want to map from BambooHR to Maxwell Health between the options of: Benefit Group (the default), Division, or Department. You can bulk edit within BambooHR to put your employees in the right "Benefit Group" and then sync over to Maxwell Health.
- › We automatically pull your census information from BambooHR, using your API key and the settings outlined above, and build your custom portal
- › At this time, to sync data between the two systems, you'll navigate to your Settings within Maxwell to manually sync with BambooHR
 - This will update the Maxwell portal based on any changes made within BambooHR since the last sync
 - In coming weeks, the data sync will be set up to run automatically at designated intervals
- › Maxwell Health is system of record for benefits and benefits administration
- › BambooHR remains system of record for all other employer and employee information

Questions?

If you have any questions about the BambooHR integration or Bamboo's product, please contact Dave Barnes:

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