

# Decision Support & Benefits Communication 2019 Vendor Checklist



If you're looking to introduce new benefits, increase adoption of a health plan, or just engage your employees so that they make better decisions for themselves and their families, you might want to consider getting help to achieve your goals more efficiently. Getting help from a vendor can extend your Benefits team with resources, technology, and communications so that you can help your employees better understand, choose, and use their benefits. We've updated this checklist to include feedback we've received like being able to track individual engagement with the decision support software and help with a variety of decisions such as investing in an HSA.

SCORECARD: WHAT TO LOOK FOR IN AN EXTERNAL VENDOR				
Criteria	Vendors			
	Tango Health	#2	#3	#4
<b>OVERALL</b>				
Is it a comprehensive, year-round program (not just a tool)?	✓	○	○	○
Does the vendor have large national organizations as clients?	✓	○	○	○
Can the program be customized to your corporate brand?	✓	○	○	○
Is the solution easy for an employer to implement with the majority of the heavy-lifting done by the vendor?	✓	○	○	○
Does the solution engage employees and help them find the best benefits for their needs?	✓	○	○	○
Does the solution include a benefits hub linking to educational materials and decision support software?	✓	○	○	○
<b>DECISION SUPPORT SOFTWARE: Personalized Recommendation</b>				
Does the software use detailed, individual claims data as a baseline for employee spending?	✓	○	○	○
Does the software transparently display the financial impact when medical scenarios are updated?	✓	○	○	○
Can you view your healthcare costs compared to an aggregated group of people like you?	✓	○	○	○
Does the software show the impact of taxes to help employees understand their actual after-tax cost?	✓	○	○	○
Is an HSA retirement calculator available to help employees estimate how much to save and invest?	✓	○	○	○
<b>DECISION SUPPORT SOFTWARE: Tailored Implementation</b>				
Is it standalone software (can be used with any benefits platform)?	✓	○	○	○
Can the software help your employees make a variety of decisions such as health plans, vision, dental, HSA contribution, and other voluntary benefits?	✓	○	○	○
Can the software provide Single Sign On with a unique identifier?	✓	○	○	○
Does the software augment the medical spending estimates to include reduced medical costs at on-site wellness centers?	✓	○	○	○

Criteria	Vendors			
	Tango Health	#2	#3	#4
<b>DECISION SUPPORT SOFTWARE: Streamlined Experience</b>				
Is the software available online and on mobile devices?	✓	○	○	○
Do employees receive a personal recommendation in three minutes or less?	✓	○	○	○
Does the interactive software allow employees to quickly run new medical-spending scenarios in a minute or two?	✓	○	○	○
Is the software simple and easy-to-use?	✓	○	○	○
Does the software allow employees to easily navigate and go back or jump to other sections?	✓	○	○	○
Does the software remember where you left off and let you revisit previously-run scenarios?	✓	○	○	○
Are education and tips included throughout the software?	✓	○	○	○
Is the software part of the enrollment workflow and offer next steps to enroll?	✓	○	○	○
Does the software provide a high-level overview as well as detailed results?	✓	○	○	○
Can the software be easily accessed at home with family members?	✓	○	○	○
Do the recommendations include clear, visual elements rather than just words for different learning styles?	✓	○	○	○
Does it cover medical as well as dental, vision and voluntary benefits?	✓	○	○	○
<b>BENEFITS COMMUNICATIONS &amp; MEETING FACILITATION</b>				
Does the solution include year-round education and communication to employees?	✓	○	○	○
Can the solution include different messages for your company's diverse population (based on personas)?	✓	○	○	○
Does the solution offer a variety of communication options to reach different learning styles: e.g. video, print, webinars, and flat screen messaging?	✓	○	○	○
Can their experts facilitate all your open enrollment meetings?	✓	○	○	○
<b>EXPERT COACHING SUPPORT</b>				
Does the vendor offer year-round phone and chat support with coaches who are experts in both your plans and in decision facilitation?	✓	○	○	○
Can a coach be invited to log directly into an employee session to discuss the recommendation?	✓	○	○	○
Are coaches full-time employees based in the U.S.?	✓	○	○	○
Does their team have years of experience communicating 1:1 with employees?	✓	○	○	○
Are the coaches HIPAA-certified?	✓	○	○	○
<b>ROBUST ANALYTICS</b>				
Does the vendor provide baseline usage analytics for their software and coaches?	✓	○	○	○
Are robust engagement analytics available from their decision support software?	✓	○	○	○
Can you easily identify trends in software usage and success (did more employees select the best plan for them when using decision support)?	✓	○	○	○

**Tip: Once you implement your external solution, remember to measure your results**