

 Benefits Technology, Powered by People

A Quick Guide to Sofia

Getting the most out of AI



FAQs about Sofia and AI

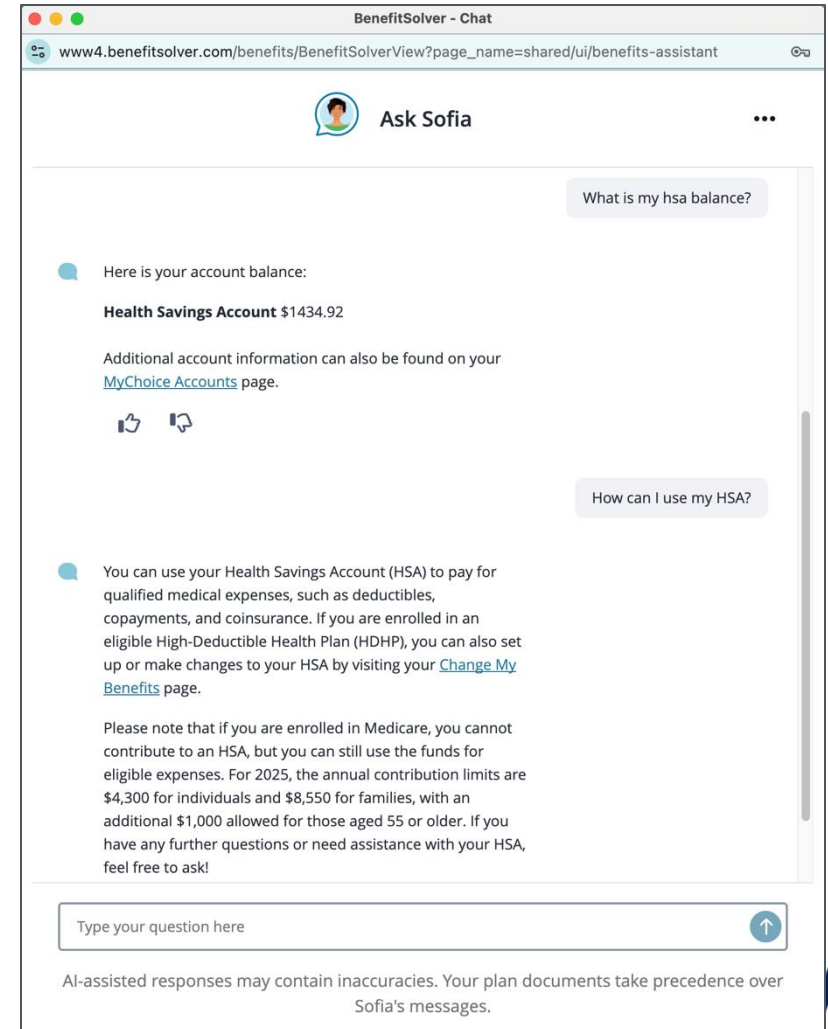
1. Is information entered into Sofia secure?

We commit to ensuring Sofia's integration with advanced AI services is built and tested for safety, complying with stringent security measures, and meeting standards such as HIPAA for the protection of Personal Identifiable Information (PII) and Protected Health Information (PHI). We employ advanced encryption, secure transmission protocols, robust auditing, and monitoring mechanisms to ensure the confidentiality, integrity, and availability of user data.

2. What if Sofia gives incorrect information?

Sofia's Cognitive Search functionality ensures that the content being searched is strictly controlled based on the access granted to Sofia for a particular client and member. The system is configured to limit the search scope to relevant documents and Benefitsolver information accessible to Sofia within the authorized boundaries. This controlled access ensures that Sofia provides accurate and relevant responses based on the available content specific to the client and member, maintaining data privacy and information security.

Sofia only gives information that the member would have access to via Reference Center or general information, like glossary terms. There is the same risk that a live HR admin from any employer could misinterpret information. Particularly for reference center searches, Sofia provides the citation and link back to the information in context.



FAQs about Sofia and AI


3. What if the member doesn't understand the answer?

Again, it's benefits, and we run this risk of discussing complex topics whether it's a member of your HR team or Sofia. Members can also ask follow up questions.

For clients with member services, Sofia can always route a member to a live chat for further help during service hours.

4. Will members see information about benefits they're not eligible for?

No, Sofia only accesses information that is visible to the member based on their structure and plan groups. The same way the layout and microsites are configured to pull in information based on eligibility, Sofia also uses these visibility rules.

 Ask Sofia ...

what is my deductible?

I can help with that! Here are the important details for your plan:

PPO High Plan

Deductible (Family): \$1,500 In-Network; \$4,000 Out-of-Network

Deductible (Individual): \$500 In-network; \$2,500 Out-of-network


[How does my deductible work](#)

[Learn About Health Care Support Programs](#)

[Give Me a Summary](#)

👍 🔄

Your deductible operates on an aggregate basis, which means that the entire family deductible must be satisfied before the plan begins to cover costs for any family member. In your case, the family deductible is \$1,500 for in-network services. This amount can be met by one family member or a combination of family members. Once the family deductible is reached, your plan will start providing coverage for all covered family members. If you have any further questions about your deductible or how it applies to specific services, feel free to ask!



AI-assisted responses may contain inaccuracies. Your plan documents take precedence over Sofia's messages.



→ Optimize Sofia – HOT TIPS

Included services to take advantage of TODAY

1. Review vendor set-up. (Benefits > Vendor Set Up)

- Make sure all vendor names, phone numbers, and websites are up to date.

2. Review your Reference Center.

- Make sure your file names are all meaningful (not abbreviated) – i.e. name the file **Benefits Guide - Medical Plan** rather than **BG_MEDPLN** or use **Summary of Benefits for New Hires** rather than **SMB-NH**. Also, no need for underscores here.
- Enable active documents and check visibility. Add tags where applicable.
- Delete or disable anything outdated.

3. Did you know you can do “Admin Chat as Member?”

- **General HR Admin Basic** and **General HR Admin Plus** Administration Groups are then able to see how Sofia answers a given question when impersonating a member. This can also help admins answer their employee questions! CSL can set up!

4. Update *Decision Support Tools*

- Even if you don’t leverage decision support, Sofia can pull information about what is covered from this section of Benefitsolver. Things like deductible amounts, out-of-pocket maximums, coinsurance and other plan details – and even pull into the mobile app (outside of Sofia).

5. Review Modifiable Fields

- Easily set up client announcements to show in Sofia AND pop up in the mobile app in **Company > Benefits Assistant**
- Review other modifiable fields to be sure all relevant information can be pulled in **Service Center Discovery** Tabs.



Give Sofia Superpowers

Additional add-ons for Sofia custom



→ Additional Ways to Deliver Sofia

Sofia Core Functionality

- Answers questions on hundreds of topics
- Standard answers included
- Should be optimized through providing access to Benefitsolver fields, so Sofia can provide employer-specific answers.
- Optimization areas include:
 - Vendor Set-up
 - Service Center Discovery Widget
 - Glossary (Custom Translations)
 - Decision Support Tool
 - Dependent and Event Verification
 - Reference Center
- MyChoice Accounts clients: account balance, how to file a claim, order a new card, add a bank account
- Chat available in 52 languages
- Quarterly conversational reports



Delivered via:
Chat
and/or
Phones

Sofia Custom

(Additional Charges Apply Based on Scope)

- Branded responses to for client-specific program names
- Customized responses about programs outside of Benefitsolver® (401k, PTO, etc.)
- Tailored responses to existing answers
- Tailored responses for NextGen enrollment
- Sofia Promotions to provide reminders and amplify client-specific benefits
- Potential to use data, file, and API integrations.





Technology, Powered by *People*

Market Leader in Benefits Technology and Innovation