



FINEOS Policy & Member Administration



FINEOS Policy is part of FINEOS AdminSuite delivered by the cloud native FINEOS Platform, powered by AWS.

Purpose-Built and Digitally Optimized for Policy & Member Administration.

FINEOS Policy offers the most comprehensive policy & member administration software solution, specifically designed for Employee Benefits products and policies at both the group and member levels. Featuring digitally optimized, fully configurable modules, it is designed to provide customer-centric views across policy and member, enable seamless self-service, and ensure exceptional service delivery.



Designed for the Employee Benefits Market

Market-Driven

Tailored to meet the needs of traditional group and voluntary business, supporting all market segments.

Accelerated Adoption

Ready-to-go product definitions and pre-configured workflows speed up implementation, ensuring a rapid time to market.

Comprehensive Support

Built-in support for a wide range of standard provisions and options, providing robust coverage for diverse needs.

Flexible and Innovative

Product configuration layer enables business flexibility and innovation, adapting to evolving market demands.

Generative and Analytical AI

Leverages AI tools to generate insights from data, predict trends, and support intelligent decision-making, improving operational efficiency and customer satisfaction.



Integral to all Business Capabilities

Seamless Integration

Effortlessly connects with external systems and the broader carrier ecosystem through a robust, business-focused API suite and data integrations, enhancing interoperability across platforms.

Efficient Onboarding

Supports incremental new group and member onboarding through integrated workflows that reflect your business processes, ensuring smooth transitions and quick setup.

End-to-End Processing

Integration with FINEOS Rate & Underwrite, Billing, Claims, and Absence

simplifies end-to-end processing for inforce business, reducing administrative burdens.

Automation and Exception Handling

Handles the complexities of group and member life-cycle changes with ease, using AI-driven automation to ensure smooth operations.

Ease of Connecting Additional Modules

Easily integrates with other FINEOS modules or third-party systems, expanding functionality as your business needs grow.



Streamlined Administration

Consistency Across Lines of Business

Provides uniformity across different lines of business on a single platform for both customers and internal teams, streamlining operations.

Real-Time Data Management

Centralized, real-time data management ensures accurate, up-to-date information accessible via all channels, enabling fast, informed decision-making.

Customized Workflows

Workflows tailored to your business practices for group implementation and servicing, distributing work efficiently across functions.

Automated Life-Cycle Management

Automatically processes group and member life-cycle alterations, reducing manual effort and enhancing overall efficiency.

Rapid Implementation

The system's design ensures quick deployment, allowing organizations to be up and running faster than with traditional solutions.



FINEOS AdminSuite



FINEOS Policy is a key module of FINEOS AdminSuite, the only modern and comprehensive core system purpose-built for Employee Benefits. It delivers a fully integrated policy and member administration solution that streamlines end-to-end processing, automates complex life-cycle changes, and ensures accurate, real-time data across all channels. Designed with customer-centric workflows and configurable modules, FINEOS Policy provides carriers with the essential capabilities to efficiently manage group and member operations today, while establishing a strong foundation for future innovation, automation, and connected ecosystem growth.

FINEOS Policy Benefits



Improved Usability and Efficiency

Task Automation

Automates routine tasks, reducing manual effort and increasing productivity across teams.

Centralized Data Management

Ensures accurate, up-to-date information, reducing workarounds and improving efficiency.

Simplified Administration

Automated life-cycle management and exception handling streamline complex administrative processes across policy and member operations.

Reduced Training Time

Simplifies training by creating intuitive user experiences, helping staff become proficient more quickly.

Ease of Processing

Focuses on simplifying everyday tasks and workflows, with robust exception handling for complex scenarios.

Generative AI for Workflow Optimization

AI tools generate workflow suggestions, improving efficiency and adapting to operational demands in real time.



Enhanced Customer Experience

Streamlined Onboarding

Integrated workflows and ready-to-go product definitions enable faster onboarding for new groups and individual members, reducing time to service.

Faster Policy & Member Processing

Accelerated creation and updates of policies and member records, ensuring quicker response times and more efficient handling of customer requests, significantly enhancing the overall customer experience.

Consistent Service

Ensures uniformity across different lines of business, offering a seamless experience for customers and internal teams.

Increased Satisfaction

Accurate, up-to-date information minimizes errors and discrepancies, leading to faster responses and improved customer satisfaction.

Personalized Interactions

Generative AI enables the personalization of interactions, improving engagement and tailoring services to customer needs.





Expanded Business Opportunities

Seamless Integration & Customization

Easily integrates with external systems to enable seamless data exchange and rapid market adaptability through flexible configuration. Supports integration of member-level data with third-party platforms to ensure real-time servicing, regulatory compliance, and a unified customer experience.

Scalability & Comprehensive Support

Supports diverse business needs with scalability, allowing for easy expansion via additional modules and third-party solutions.

Real-Time Data & Enhanced Self-Service

Delivers real-time, centralized access to accurate data, improving decision-making and operational agility. Empowers customers, partners,

and members with intuitive self-service capabilities, enabling access to policy information, updates, and service requests, enhancing transparency, satisfaction, and engagement across all user types.

Continuous Innovation & Upgrades

Regular product updates introduce new features, keeping the system innovative and competitive.

AI-Driven Business Insights

AI analytics offer valuable data-driven insights to refine business strategies and decision-making.

Future-Ready Growth & Connectivity

Designed for long-term growth, the system connects seamlessly with emerging technologies for continuous adaptation.

Summary

FINEOS Policy & Member Administration combines flexibility, connectivity, and advanced AI capabilities to provide a modern, comprehensive and efficient solution for policy and member administration in the Employee Benefits market. With rapid implementation, seamless integration, and an out-of-the-box design, it supports diverse business needs, enhances customer experiences, and accelerates business growth. Leveraging generative and predictive AI, the system offers powerful tools for automation, decision-making, and personalized interactions, making it an essential tool for modern benefits carriers.

FINEOS is a leading provider of core systems for life, accident, and health insurers globally. The FINEOS Platform for Employee Benefits is purpose-built for the group, absence, and supplemental benefits market. More than forty customers in North America use the FINEOS Platform, and FINEOS serves 7 of the 10 largest employee benefits insurers in the U.S. as well as a 70% market share of group insurance in Australia. With employees and offices throughout the world, FINEOS continues to work with innovative, progressive insurers in North America, EMEA, and Asia Pacific.

Visit our website: www.FINEOS.com

To learn more about **FINEOS Policy** or to request a demo, email: info@FINEOS.com

