Plan Studio – Updated User Interface (4/27/2026)

Frequently Asked Questions (FAQs)

Where did the “Clients” and “Prospects” tabs go?

We’ve consolidated both into a single **Plan Sponsors** list. Every employer — whether you’re working with full data or partial data — now lives in one place. This eliminates duplicate setup and makes it easier to move between analysis and tools.

How do I know which Plan Sponsors have full data vs. partial data?

Once you open a Plan Sponsor, the dashboards and tools available to you will reflect the data that’s been entered. Full-data clients and partial-data prospects now use the same workflow; the platform adapts based on what’s available. Full data plan sponsors (previously found under “Clients”) are now known as Full Plan Management groups. Partial-data groups (previously found under “Prospects”) are labeled as Focused Analysis groups.

Where are the actuarial tools now?

Actuarial tools are now **embedded directly within each Plan Sponsor’s page**. This means:

- No more jumping back to a separate Tools page
- Tools automatically stay in context with the plan sponsor you’re working on
- The same tools are available whether you’re modeling a prospect or analyzing a client. The difference only lies in how much data you have access to.

Can I still use tools for groups without full claims data?

Yes. All Standalone Actuarial tools are available for partial-data groups, just as before — they’re now simply accessed from within the Plan Sponsor page instead of a separate “Prospects” area.

What changed about exporting dashboards to PDF?

You can now export an **entire dashboard** to a single PDF, rather than one page at a time. This is especially helpful for client-ready deliverables.
Exporting is currently enabled for a limited set of dashboards, with ongoing roll-out to additional dashboards.

Where do I import or manage high-cost claimant data?

High-cost claimant data is managed through the **new AI Assistant**, available for Full Plan Management plan sponsors, under the HCC page found within a plan year.

Do I need to re-enter data because of the interface change?

No. All existing Plan Sponsors, plans, and historical data carry over automatically. The update changes how you navigate, not your underlying data.

What subscription tier am I on now?

All users are now on **Plan Studio**, with access to the full platform. We've removed tier distinctions to simplify usage and ensure consistent access to tools and dashboards for all our users.

When will pricing change for me?

License pricing is only changing for users in the "Premium" tier. Pricing for users in the Professional or Concierge tiers **has not changed**.

Pricing for Premium users will move from $200 to $500 per month at the *later of*:

- Four months from now, or
- Your original 12-month subscription anniversary

You'll continue paying your current rate until then. Try adding some Full Plan Management group types now to access some of our best dashboards and actuarial tools.

What if I can't find something I used to use?

If something feels "missing," it's usually because it has moved **into the Plan Sponsor context**. Start by opening the page for your Plan Sponsor and looking at the tools and dashboards available there. If anything still seems unclear, just reach out. We're happy to help.

Will there be training or walkthroughs for the new layout?

Yes. We're continuing to add walkthroughs, videos, and documentation to help users get up to speed quickly, especially around navigation and tool placement.