



CARROT

# Welcome to Carrot for Okta

REBECCA PRUENTE  
CUSTOMER SUCCESS

## OVERVIEW

# Today's agenda

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- Why fertility and family forming matter
- Introducing Carrot
- Your Carrot benefits
- How to access your benefit
- Q&A

If questions come up you do not want to ask during the webinar, please reach out to [support@get-carrot.com](mailto:support@get-carrot.com) for assistance



Supporting everyone and everything

Single male,  
oncofertility,  
sperm freezing

Same sex,  
female couple,  
IUI

Transgender  
man with a  
cisgender woman,  
IVF with ICSI  
and donor sperm

Single male,  
gestational  
carrier

Single female,  
egg freezing

Heterosexual  
couple, IVF  
then adoption

Single female,  
adoption

Single female,  
oncofertility,  
egg freezing

Single female,  
IUI, with an  
egg donor

Transgender  
woman with a  
cisgender woman,  
spontaneous  
conception

Heterosexual  
couple,  
gestational  
carrier

Same sex  
couple,  
egg donor

Heterosexual  
couple,  
donor eggs  
and IVF

Same sex,  
female couple,  
double IUI

Heterosexual  
couple,  
sperm donor  
and IVF

Same sex  
couple,  
IUI

OUR GOAL

## Introducing Carrot

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Our goal is to provide members with access to the best fertility care and trusted educational resources to make family forming easier and more accessible to all.



# Your sponsored fertility and family forming benefit

Okta is providing reimbursement for 100% of your eligible fertility, adoption, and gestational carrier expenses up to the following limits

LIFETIME MAX	COST SHARE	
\$5,000 USD	100%	Includes spouse or domestic partners



WHAT IS REIMBURSEMENT-ELIGIBLE?

Treatments and services provided by an eligible fertility provider, adoption agency or gestational carrier agency.

## Transitioning Care: Common Questions

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1. When do my expenses become eligible for Carrot?

**Answer:** Auth0 employees will become eligible for Carrot on 1/1/2022; prior to then, please continue to use your current benefit

2. What do I do if I am currently receiving fertility treatment or services?

**Answer:** Please reach out to our Care Team at [support@get-carrot.com](mailto:support@get-carrot.com).

Although your benefit becomes active on 1/1/2022, our Care Team is available for any questions before then. They will help you understand your fertility benefits, check if your current provider is in our network, and help you find an eligible provider if needed.

3. What if I am actively in treatment but my provider is not approved by Carrot?

**Answer:** If your current provider is not Carrot eligible, our Care Team will work with you to evaluate your current care and determine if your expenses are eligible for reimbursement. Please reach out to [support@get-carrot.com](mailto:support@get-carrot.com) for more information

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# Covered treatments and services

**TESTING AND DIAGNOSTICS**

- Initial fertility consultation
- Transvaginal ultrasound baseline
- Semen analysis
- Lab tests and diagnostic procedures
- Genetic carrier screening

**FERTILITY PRESERVATION**

- Egg retrieval
- Sperm freezing
- Egg freezing
- Embryo freezing

**TREATMENTS**

- In vitro fertilization (IVF)
- Intrauterine insemination (IUI)
- Donor sperm acquisition
- Donor egg acquisition
- Egg and sperm storage
- Shipping and transport of materials

**ADOPTION & SURROGACY**

- Adoption agency services
- Adoption related legal services
- GC-related legal services
- GC-related agency services

# What Carrot provides



## SECURE WEBSITE

Securely access a dedicated website featuring powerful tools, trusted clinical content, and reimbursement processing of out-of-pocket expenses.



## FINANCIAL ADMINISTRATION

Securely submit and receive payment for your qualified out-of-pocket expenses. Our team will process your statements send your reimbursement within the first 10 days of the following month to your bank account on file.



## DEDICATED CARE NAVIGATION

Our Care Navigation team is available to answer questions and connect you to the best clinics to help you reach your goal.




Prior to Jan 1st, email [support@get-carrot.com](mailto:support@get-carrot.com) for any questions

Activate your account here: [app.get-carrot.com/signup](https://app.get-carrot.com/signup) (former Auth0 employees can activate their account starting on Jan 1, 2022)

# Benefit Guide

Your benefit guide includes valuable information including financial coverage, eligible expenses, partner eligibility, and tax implications.

 **Your Benefit Guide**

– About your benefit

Coverage

Paying for care

More information

## About your benefit

Carrot is a benefit designed to support your unique parenthood journey. Carrot is not health insurance but rather provides resources to make family forming more accessible to everyone.

One way we do this is through employer-sponsored funds you can use to pay for care and services from eligible providers. For details about how those funds work, possible tax implications, and other financial matters, check out [Paying for Care](#).

# Read + Learn

Several treatments require specialized, step-by-step instruction. You'll find step-by-step video content to make the process easy.

Read + Learn > IVF

## How to do the Trigger Shot




# Carrot Plans

Your Carrot Plan is developed by a Carrot expert and personalized specifically for you to guide you every step of the way in your family-forming journey.

## Your Carrot Plan

When you're ready to access Carrot funds, experts, providers, and more, tell us about your family-forming journey and we'll craft a free, personalized plan to support you.

Get your Carrot Plan



FEATURES

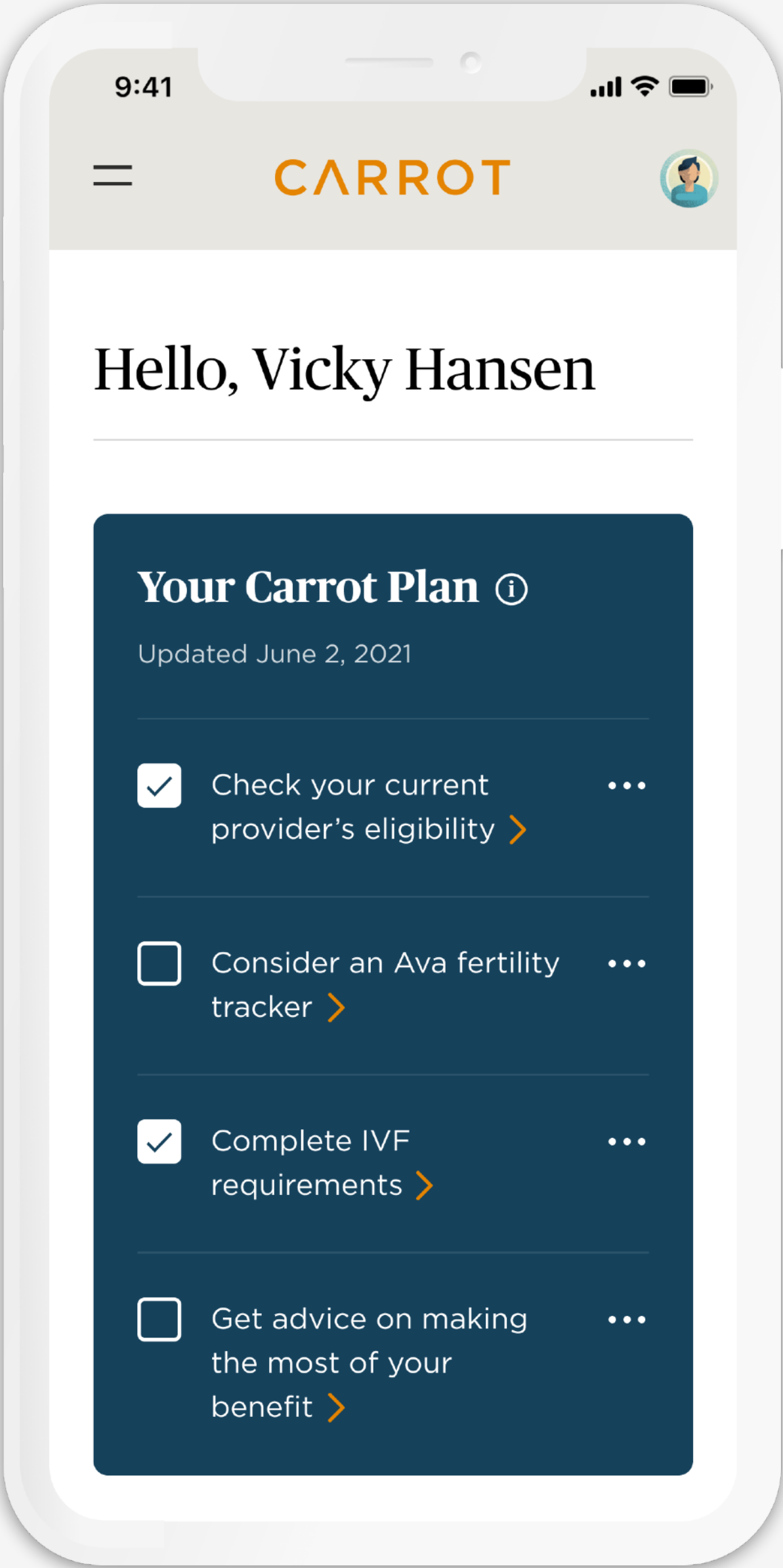
Personalized for you

To create a Carrot Plan, you will answer a series of questions. These answers will help us match you with an expert for a conversation after which they will create your Carrot Plan.



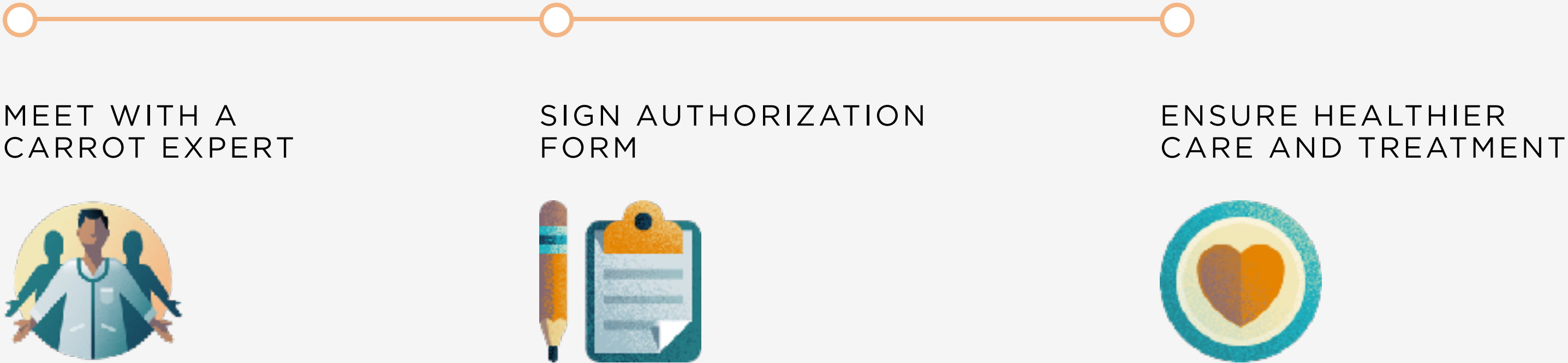
# Your journey with Carrot

Your Carrot Plan is personalized with recommended steps for your journey. You also have full access to Carrot’s robust platform of resources and support.



# IVF Reimbursement

In order to ensure healthier outcomes, members and their partners on an IVF journey have additional steps to complete before getting reimbursed for care.



# Find a provider

Locate a Carrot-eligible clinic near you to receive care.

## Eligible providers

UNITED STATES / CALIFORNIA

<a href="#">Agoura Hills</a>	<a href="#">Irvine</a>	<a href="#">Redwood City</a>
<a href="#">Alhambra</a>		<a href="#">Riverside</a>
<a href="#">Arcadia</a>	<a href="#">La Jolla</a>	<a href="#">Roseville</a>
	<a href="#">La Quinta</a>	
<a href="#">Bakersfield</a>	<a href="#">Laguna Hills</a>	<a href="#">Sacramento</a>
<a href="#">Berkeley</a>	<a href="#">Lancaster</a>	<a href="#">San Diego</a>
<a href="#">Beverly Hills</a>	<a href="#">Loma Linda</a>	<a href="#">San Francisco</a>
<a href="#">Brea</a>	<a href="#">Los Angeles</a>	<a href="#">San Jose</a>
<a href="#">Burbank</a>	<a href="#">Los Gatos</a>	<a href="#">San Luis Obispo</a>
		<a href="#">San Ramon</a>
<a href="#">Carlsbad</a>	<a href="#">Manhattan Beach</a>	<a href="#">Santa Barbara</a>
<a href="#">Chino</a>	<a href="#">Menlo Park</a>	<a href="#">Santa Clara</a>
<a href="#">Clovis</a>	<a href="#">Modesto</a>	<a href="#">Santa Monica</a>
<a href="#">Corona</a>	<a href="#">Monterey</a>	<a href="#">Santa Rosa</a>
<a href="#">Costa Mesa</a>	<a href="#">Mountain View</a>	<a href="#">Sherman Oaks</a>
		<a href="#">Sunnyvale</a>
<a href="#">Diamond Bar</a>	<a href="#">Napa</a>	
	<a href="#">Newport Beach</a>	<a href="#">Tarzana</a>
<a href="#">Encinitas</a>	<a href="#">Novato</a>	<a href="#">Temecula</a>
<a href="#">Encino</a>		<a href="#">Thousand Oaks</a>
	<a href="#">Oakland</a>	<a href="#">Torrance</a>
<a href="#">Foster City</a>	<a href="#">Oceanside</a>	
<a href="#">Fountain Valley</a>	<a href="#">Orinda</a>	<a href="#">Vacaville</a>
<a href="#">Fremont</a>	<a href="#">Oxnard</a>	<a href="#">Valencia</a>
<a href="#">Fresno</a>		<a href="#">Ventura</a>
<a href="#">Fullerton</a>	<a href="#">Palm Springs</a>	
	<a href="#">Palo Alto</a>	<a href="#">West Hollywood</a>
<a href="#">Glendale</a>	<a href="#">Pasadena</a>	<a href="#">West Los Angeles</a>
<a href="#">Glendora</a>		<a href="#">Westlake Village</a>
<a href="#">Greenbrae</a>	<a href="#">Rancho Cucamonga</a>	<a href="#">Westminister</a>
	<a href="#">Redondo Beach</a>	

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## Culturally competent care

You can request to be matched with a BIPOC or LGBTQ+ affirming provider at a Carrot clinic.

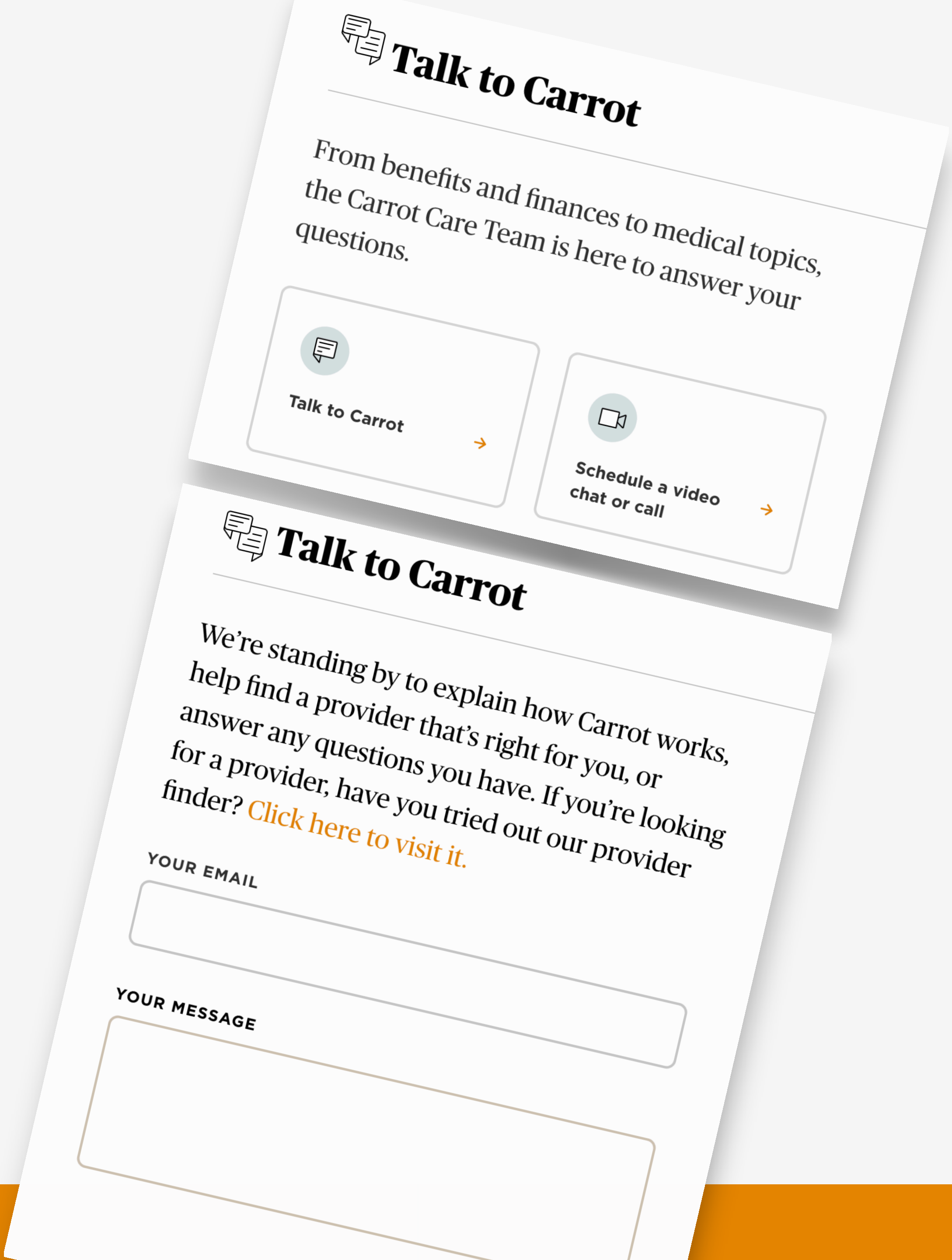
Log into your Carrot app and connect with your Care Team to find out more.



# Talk to an expert

You or your domestic partner/ spouse can contact Carrot for help finding a clinic or agency and getting advice or answers to questions that might come up along your journey.

Benefits chats are available in the following languages: French, Spanish, German, Mandarin, Japanese, Hebrew and Vietnamese



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# Talk to a medical expert

You or your domestic partner/spouse can get unlimited telehealth access to doctors, nurses, specialists, and more. Schedule virtual visits with our medical expert team through the Carrot app.



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# Carrot medical expert specialties & topics

**FERTILITY**

- Initial consultations
- Fertility preservation
- In vitro fertilization (IVF)
- Male fertility and preservation

**ADOPTION & SURROGACY**

- U.S. domestic adoption
- International adoption
- Foster to adopt adoption
- Gestational carrier journeys

**LGBTQ+**

- Navigating LGBTQ+ family building journeys

**EMOTIONAL SUPPORT**

- Emotional support for adoption, fertility, and GC journeys

**PRESCRIPTION SUPPORT**

- Medication and treatment questions
- Injection administration

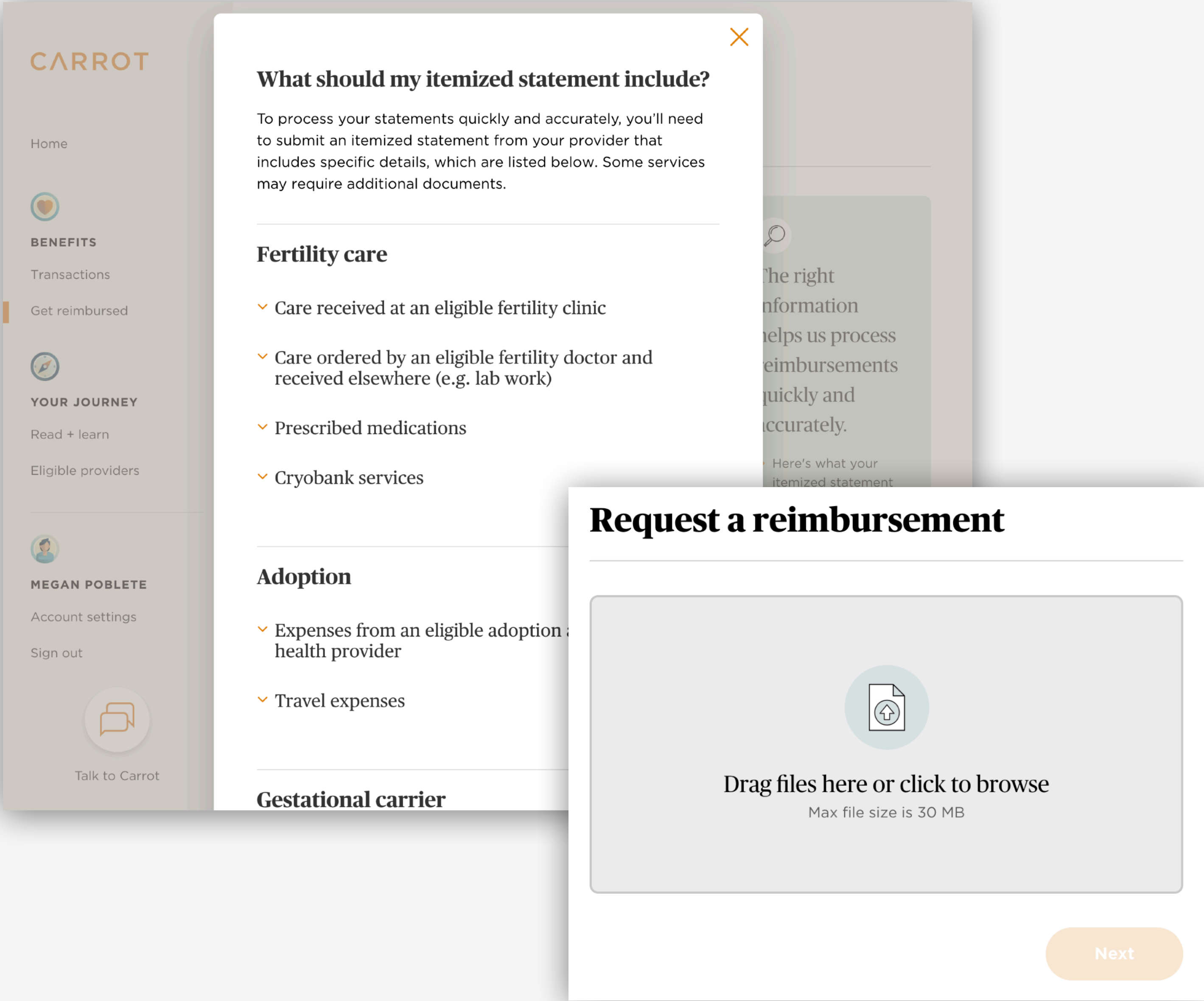
**PREGNANCY (US ONLY)**

- Medical questions
- Labor and birth plans
- Nutrition in pregnancy
- Lactation and breastfeeding support

# Get reimbursed

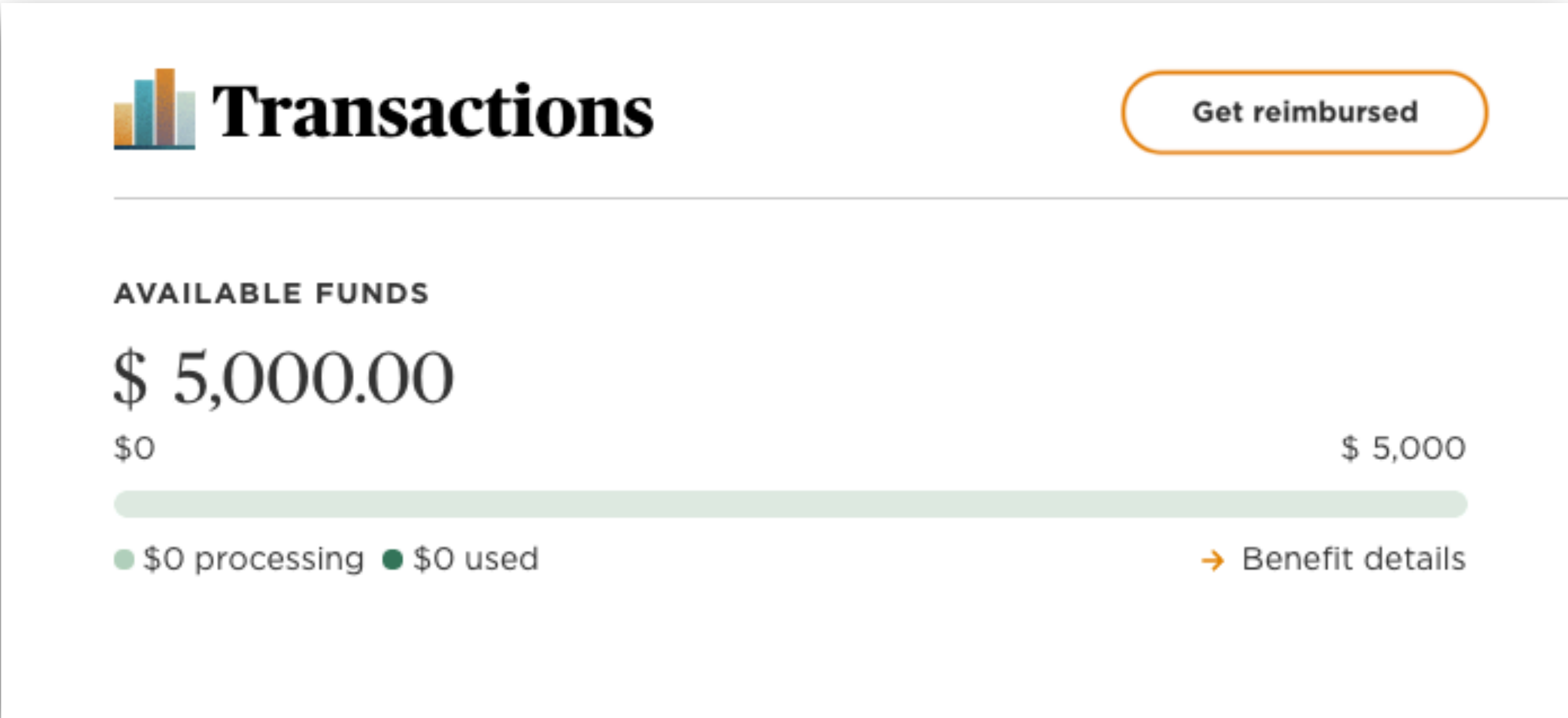
Upload paid invoices for eligible fertility, adoption, and gestational carrier expenses and we'll process your reimbursement. You will be reimbursed directly to your bank by Carrot.

Your employer-sponsored reimbursement allowance may be considered additional income and therefore, may be a taxable benefit.



# Track spend

The Carrot app will keep track of how much you have spent towards your benefit maximum, and how much you have left.



## FEATURES

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### At-home care\*

Carrot offers you the option of pursuing care from the comfort of your own home through the use of the Ava bracelet or Legacy. Ava is a wearable ovulation tracker while Legacy provides at-home sperm analysis.

*\*Please note that Legacy is available only to US members and Ava is available in the US as well as a number of European countries.*





## A quick recap

## NEXT STEPS

### Key things to remember

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1. Reach out to our Care Team if you have any questions: [support@get-carrot.com](mailto:support@get-carrot.com)
2. Activate your membership (*Auth0 employees can activate their membership starting Jan 1, 2022*)  
Sign up at [app.get-carrot.com/signup](https://app.get-carrot.com/signup)
3. Once you're ready to embark on your family-forming journey, get your personalized Carrot Plan
4. Find a Carrot Partner clinic for priority booking and negotiated discounts
6. Pay out of pocket and get reimbursed



# Where to Find 2022 Benefits Information and Support



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## Rightway Healthcare Navigator

[consumer.rightwayhealthcare.com/signup](https://consumer.rightwayhealthcare.com/signup)



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## Okta Benefits Team and People Ops Shared Services

[benefits@okta.com](mailto:benefits@okta.com)



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## Total Rewards Website

[rewards.okta.com/us](https://rewards.okta.com/us)

# Questions?

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