Guide Me - On Demand Training

Jagdish Chugani – Vice President, Human Resources
Jo Phelps – Senior Learning and Development Specialist
The VUCA world continues

Volatile... a rapid rate of change
Uncertain... unclear about future implications
Complex... multiple competing/conflicting forces
Ambiguous... lack of clarity about what events will mean — even as they occur

What we need: Evolving Learning to real-world issues

✓ Self-Service
✓ On-Demand
✓ Easy to Search
✓ Clear Direction
✓ Knowledge Retention
✓ Agility to adapt to a changing platform

“The kinds of tools and learning that works – is very clear about where you are going but very flexible in how you get there”
A changing era

Time to Innovate
Learning Approach
Finding solutions for all of us
PlanSource Values

*Empowerment leads to Improvement*

Philosophy

*We empower you to learn when you want, how you want, and where you want*
GuideMe is here to help – Help when you most need it and with instant gratification!

Helping not only administrators help themselves – but helping brokers, employees and new hires.

Helping build system confidence and knowledge – while onboarding and beyond.

Helping keep everyone happy.
GuideMe
Philosophy

**When**
You will have access to on-demand training that allows you to consume information at the point of need, rather than forcing you to rely on recall.

**How**
You will have access to a variety of learning materials that will map to different learning styles and preferences.

**Who**
You are a Platform User, Broker, Partner, New Hire, Employee
Uses for GuideMe

Better Knowledge Retention

• Features and Platform Capability Training
• New Releases Training
• Onboarding
• Benefit Administrators Training
• Broker Training
• Employee Training
GuideMe is more than Walk-thrus
Walk-Throughs Ready for Launch
Step-by-Step Balloons

**Employee Management**
- Edit a Life Event
- Create a Life Event
- Process a New Hire
- Terminate an Employee
- Rehire an Employee
- Process a Work Status Event
- Reset All Employee Passwords
- Reset an Employee Password
- Unlock an Account
- Add COBRA Coverage
- Terminate COBRA Coverage
  - Manually Create a Test Employee
  - Auto-Create a Test Employee
  - Process an EOI Request
  - **ACA**
    - Create and Upload an ACA Payment Form
    - Add a New ACA Calendar Year
    - Preview 1094-C and 1095-C Forms
    - 1095-C Form
    - Create/Upload an ACA Payroll File
    - Add a New ACA FEIN
    - Add a New ACA Calendar Year

**Reporting**
- Run a Payroll Deduction Report
- Run an Employee Benefit Report
- Run an Employee Census Report
- Schedule a Report
- Complete a Data Import

**Workflow and Tools**
- Life Event Processing
- Create a New Administrator
- EDI Dashboard
- Implementation Dashboard
- Configure EOI Subscriber Emails
Resources Ready for Launch

Additional Instructional Content

**Videos**

Home Page Navigation
Employee Management
Tickets
Audits
Reports
Data Center Worksheet Downloading
Welcome to GuideMe

What is HSA?
HMO, PPO, and HDHP plan
Subscriber’s 1095-C Electronic Access
Work Status Event
Explaining ACA Payroll Worksheet
Column Headers
Reference Documents

- Document Solutions Management
- Voyager Release Notes
- EDI Dashboard
- Implementation Dashboard
Resources Ready for Launch
Additional Instructional Content

SmartTips

New Hire Processing
Work Status Processing
Eligibility Start Date
Document Processing
Life Event Processing
EOI Processing
EOI Dependencies
Data Import History
Data Exports

Subscriber Email Wildcards
Configure Subscriber Emails
WSE Button Processes
Document Management Solutions
Subscriber UI
Carrier Billing
Tickets
Reports and Graphs
Data Import

…and many, many more on the way!
Rollout Plan

• Debuted at Eclipse
• Will be turned on for all Elite, Core and Co-source clients post-Eclipse – August 1
• Part of our core offering
• Defaulted to ‘on’ for new clients
What is Guide Me?  
How does it help me?  
Let me see it!!
Your Guide is Ready
Introducing GuideMe!

Click the GuideMe menu on the right hand side of your screen to get guided help, resources, and videos!

Learn more in the quick video below!

Guide Me  No Thank You