Create a New Client Folder on the XDrive

What is the New Client Folder?

The new client folder houses the information utilized during the implementation process. Documents and communication during the configuration are filed here for reference.

Creating a New Client Folder

1. Follow the path to the list of all clients: **X: Company/Plansource/Client**
    - Note: Remember the client is filed under the broker's name
2. Select the client
3. Create a new folder and utilize the client's name to identify the folder
4. Drag and drop the implementation folder into the new client folder
    - The Implementation folder should be in your quick access links (refer to the video)

New Client Folder

There are eleven sub folders in the new client folder. The information below provides a description of the documents that should be filed within each sub folder.

Client Sign Off:

- *System Acceptance Form* - After you have uploaded the data into the PlanSource system and the client has cleared the validation report and approved the data in the system, they sign the system acceptance which gives PlanSource the approval to begin interim/CCT reporting and EDI configuration/testing.

- *Acceptance Form*- After the client has tested the system, they will sign the system acceptance from agreeing that the system meets their needs and giving final configuration approval.

- *Transition Folder*- The transition folder is where you save all required items from the transition checklist. (system sign off, data acceptance, finalized wizard configuration report, clean validation report, clean recalc, internal project plan, client timeline, and any other items needed for transition.

- *Onboarding Transition Checklist*- Onboarding fills out this document and send it with your transition submission.

- *Plansource Internal Client Transition*- This PPT is required for transition you fill it out with general client information and things the AM might need to know after transition.

Configuration:

- *Original Documents* - Documents provided in the new client email are filed here along with any other documentation the client provides.

- *CRG* – You will save the final configuration doc in this folder along with any updated configuration reports from changes that were made in the system.

Content:

- All pictures, word documents, videos, etc. that you are utilizing to customize the employee enrollment pages. This includes branding information and Logos.

Data:

- *Imports*- Save any imports that you upload into the PlanSource system. Create new folder within the import for specific dates that imports take place.

- *Interfaces*
  - Group Demographic Report
  - Payroll

- *Original Data Files*- This will contain all the original data files that the client/carrier/Proview will provide to you before importing begins to happen.

- *Templates*- These are sample templates you can provide a client at the beginning of the implementation process to show them what they are going to provide in the future.
  - Dependent Census Template
  - EE Census Template
  - Medical Template

- *Testing*- You would include any test data that you imported (EE census, Dep Census, coverages).

Document Library

- Content the client would like to add to the document library.

EDI:

- *CCT* – Information pertaining to carrier connect is filed here.

- *Generic Carrier request template*- This is a sample of what you would send to carrier request group structure and EDI file layouts for your groups.

Project Management:

- This folder contains the project management tools for implementation. You will also save any items that you used agendas, meeting notes, etc. We do not use anything saved in the additional resources folder.

Proview:

- If Proview completes the data conversion, configuration, or anything else, you would save the information in this folder.

QA Checklist:

- The configuration analyst fills out the appropriate document before it is submitted to QA. The correct Checklist is required for submission.

Reports:

- Sample reports that you build for clients can be saved in this folder.

Testing – Training:

- This contains the test employees or any testing docs that you provide the client during testing.