

Saving the Documents in the New Client Email

What is the New Client email?

The New Client email contains important dates and information pertaining to the client's configuration. Once Onboarding has verified the information from sales, the new client email is sent to the implementation team.

Figure 1: New Client Email

Subject: FW: Russell Standard / Huntington Insurance

Attached:

- Legal Documents.zip (1 MB)
- Implementation Timeli... (46 KB)
- Onboarding Checklist... (31 KB)
- UMR Medical Plan Desi... (20 KB)
- MetLife.zip (2 MB)
- 2017 Pay Schedules.xlsx (67 KB)

Good Afternoon **Kappa Team**,

This **Core** client has been assigned to you and your team. Erin Weber will be the PM and Tasha Beckford will be the CS. Their Requested Go Live Date is **03/01/2017**. They will be going into an **Active OE** launch for their 04/1/2017– 03/31/2018 plan year. Kappa Team please reach out to their broker and client contacts by **COB 02/08/2017** to establish their kick off call and setup their ongoing project management calls. Please note the group does have some **Grandfathered** plans.

They have **250** Employee Lives per their workbook. They are **not an Elite Broker** and under an **Direct Contract**. They are also an **MetLife PSA** client. **Contracting:** this group is under a Kick off call +60 day contract. <https://na33.salesforce.com/006390000n1GK0>

Data Conversion: NA as this is an Active OE, we will only load Census data.

Consumer Support: please connect with **Jamie Jarvis** on the information needed for this product

ACA: **Shannon Martin** will own the 2017 ACA project for this client.

Sales Team,
Please connect with the Kappa Imp team on any of those additional information

Service,
Our Service team will provide the ongoing support for this client.

Original Documents from the client

Team Information and Key Dates

Client Data

Additional support

Save the Original Documents

The original documents from the client need to be saved in Salesforce under the Implementation project and on the XDrive in the new client folder.

Salesforce:

1. Pull up the client in Salesforce
2. Select Projects from the top menu bar
3. Click on the Implementation Project
4. Save the original documents under the notes and attachments section

OR

1. Type in the project number
2. Save the original documents under the notes and attachments section

XDrive:

1. Follow the path: **X: Company/PlanSource/Clients**
2. Locate the new client folder
Note: Remember to search for the client under the broker's name
3. Click on the Implementation Folder
4. File the documents under Configuration in the Original Documents sub folder