Service Connect Training Session 3A: Requests & Activities

USG

April 2019 Revised

Alight Solutions

Agenda

1

Case Management (Service Connect) overview

2

Demo

3

Working together

4

Discussion and questions

Meeting Highlights and Housekeeping

- Introduction of Facilitators – Jennifer Kennington, Theresa Wood, Maria Markiewicz & Maritza Almodovar
- Please place all phones on Mute to avoid feedback and background noise
- We have a large group to train. For that reason, we are using a webinar format where we will demonstrate how to use the Service Connect Support Tool. Practice using the tool can be done after using the test eCS tool and the test participants provided. The webinar is being recorded and the recorded file will be stored and available on the 'OneUSG Connect Smart Sheet'
- We have blocked 2 Hours for this session. We will try to answer all of your questions as we go along. If we do not get to your question, feel free to email me after. A copy of this deck has been included in the meeting invite. My email address is: theresa.wood@aonhewitt.com
- Although we are showing you how to access the Service Connect Tool using eCS, you all will have access from your own personal Connect-Benefits portal through Single Sign On (SSO) by navigating to the 'contact us'

Chat support will be provided during the first week of go-live for Service Connect specific questions

Call Center Tools: Service Connect

- Built on a SaaS-based **service cloud** environment that blends **industry-leading best practices** with deep domain expertise around talent, retirement, health, and HR operations

Alerts and Attention Items
Client, participant-specific, and team-related items

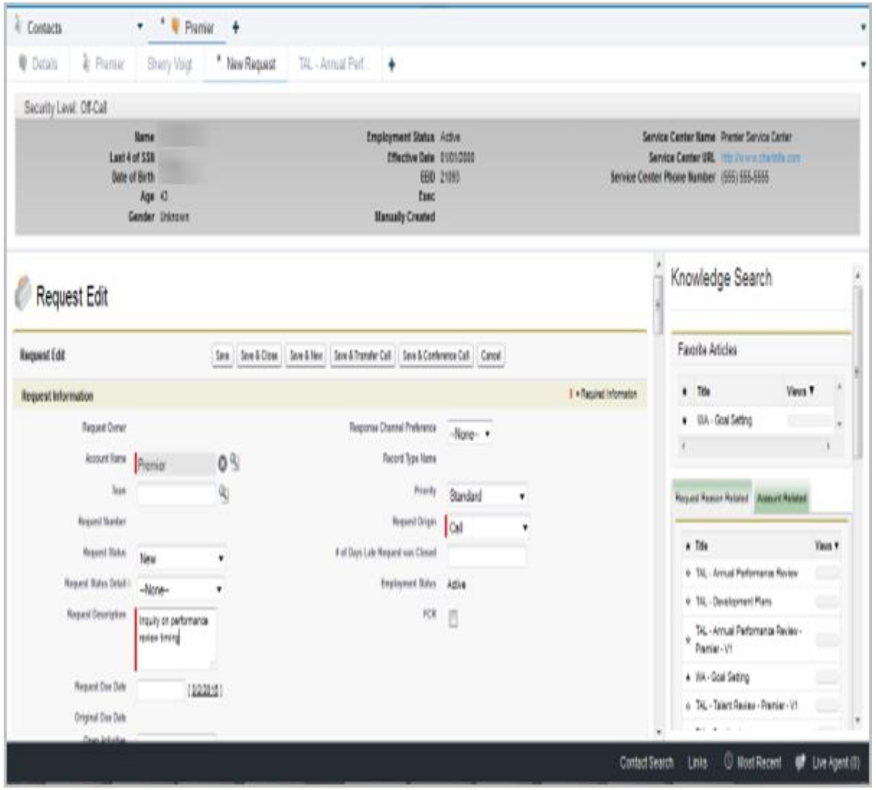
At-a-Glance
Customer-specific data for transaction and decision support

Document Imaging
Access to inbound and outbound paper and faxed documents

History and Tracking
Customer interactions with all channels

Integrated Knowledge Management
Designed to drive recommendations based on client history and current inquiries with complete feedback loop

Cross Channel Analytics
Real-time reporting and analytics for internal users, helping drive continuous innovation



alight

Service Connect: A Unified Application

Stronger, more informed solutions

Stronger, more informed solutions

- **Call handling capability**
  - Enables Aon colleagues to collaborate with clients to resolve customer needs
  - Front- and back-office consoles
- **Case management**
  - Designated client employees create cases and respond to activities assigned to them
  - Single categorization values for calls and cases driving consistent cross channel insights
  - Improved escalated case handling and reporting
  - Real-time reporting
- **Integrated knowledge management**
  - Article recommendations based on case topic
  - Rating and feedback loop
- **Enable service excellence**
  - Commonality across Outsourcing
  - Reduce issue resolution time
  - Make it easy for colleagues to make it easy for Clients
  - Inform business decisions and strategies

Service Connect and why would I use it?

- Service Connect is a feature that is utilized by assigned HR Benefits Practitioners. If more extensive assistance is required, assist employees with contacting the OneUSG Connect- Benefits Call Center
- HR Benefits Practitioners will use to assist employees with day to day Benefits questions that require research from our Customer Service team in order to resolve (non-escalations)

  Example: A newly hired employee comes to your office and asks you for assistance with why their HSA shows $2,500 in the OneUSG Connect-Benefits Portal but their Confirmation of Benefits shows $1,500.

  HR Benefits Practitioners Action: If you are unable to make sense of what you are seeing, submit a request

- Anytime a request is submitted, the assignee will receive an email notification that you have a request that requires your action
- The Service Level Agreements (SLAs) for response times are as follows:
  - 95% within 5 days
  - 98% within 15 days

  – The webinar will train new users on how to access the tool, submit a request and respond to a request.

Service Connect overview

- Benefits and terminology
- Requests and activities
- How to access
- Views and permissions by role
- Client partner vs. employee view of the tool
- Notifications

Service Connect overview

Benefits of the tool
Intuitive tool with real-time information
Provides one place to view information
Easier to work together
Better planning and execution
Standardized business processes
Ultimately more efficient

Service Connect terminology

USG

Many

One Account
The Client

Many Contacts
Employees, Participants (Retiree, Beneficiaries),
Client Partners, HR Benefits Practitioners

Service Connect terminology

Contact

Request(s)

One (or more)

Activity

Activity

One (or more)

Activity

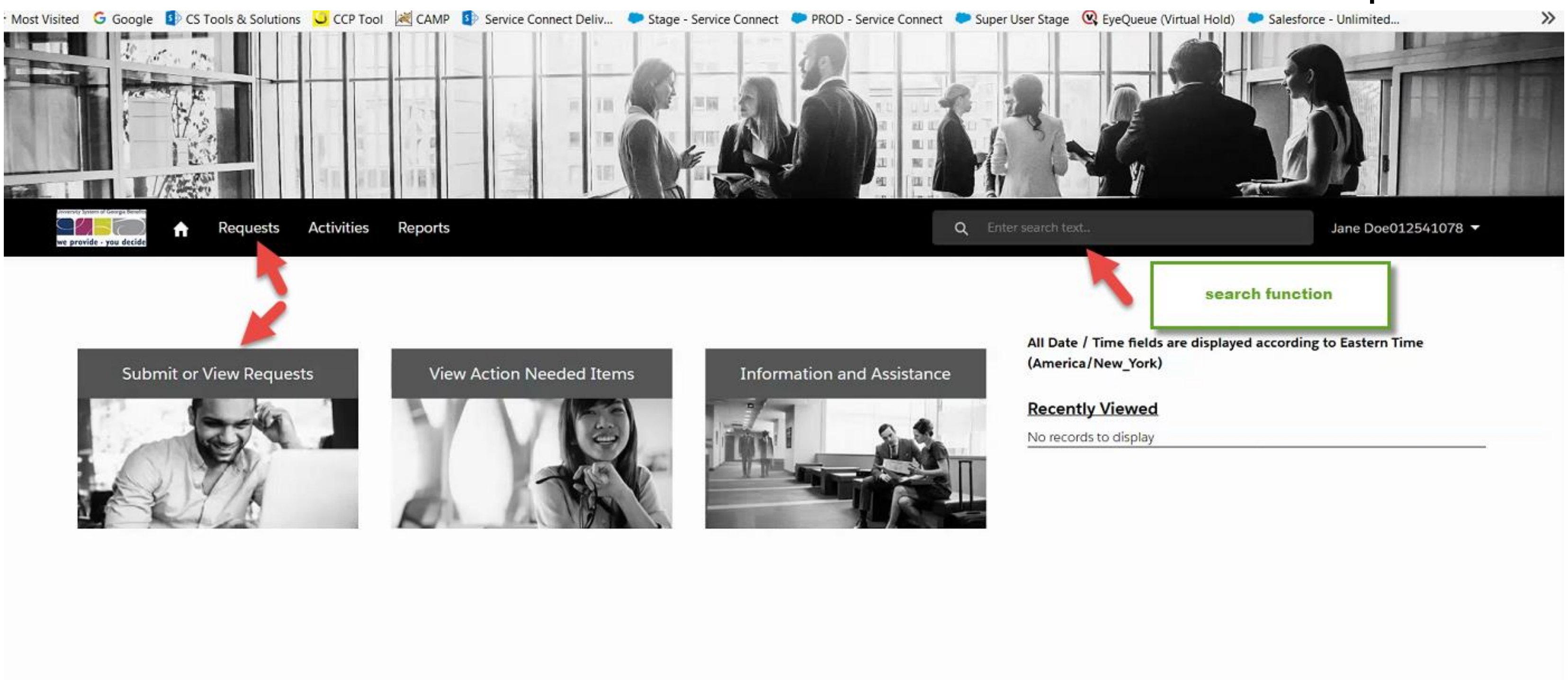
Requests and activities

Request One (or more) **Activity**

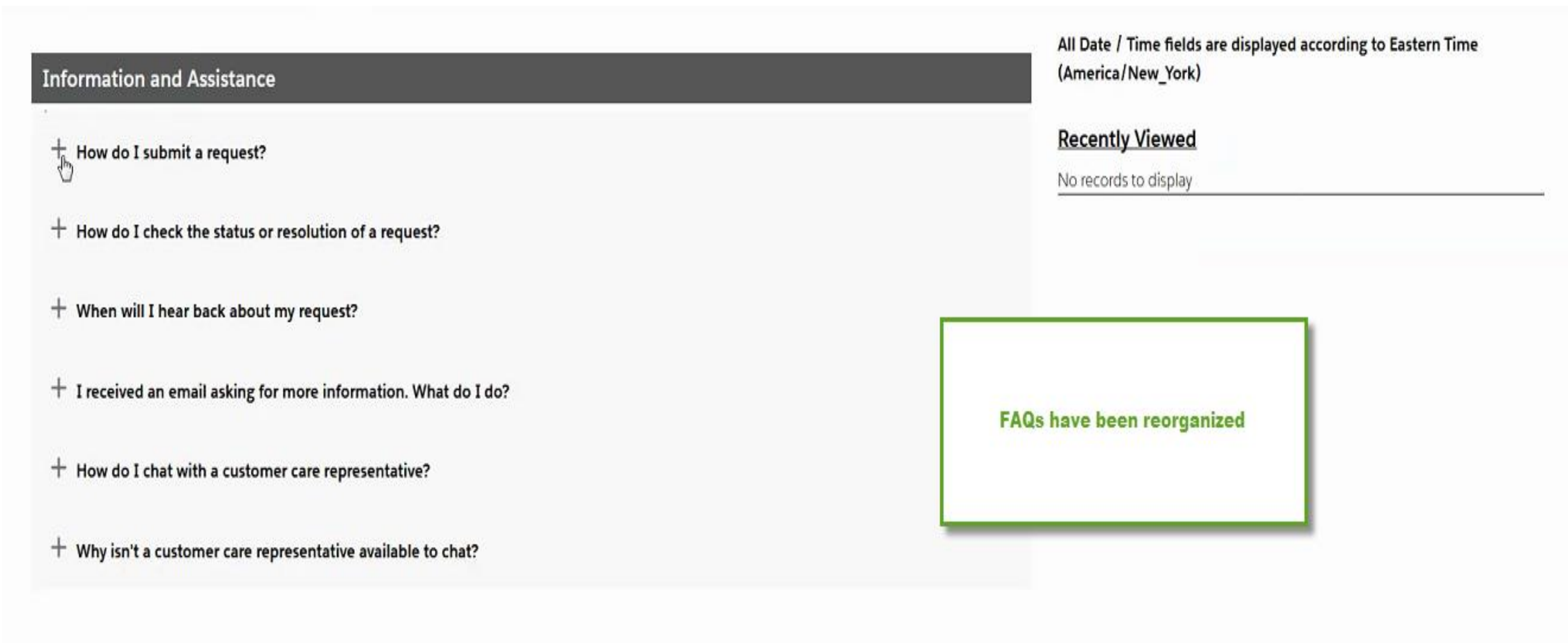
- A request is always created, even if the issue is resolved on the initial interaction.
- Multiple requests could be created for an interaction.
- Every request will have at least one activity.
- Other records **(Related Lists)** may be tied to the request. For example, chat transcripts, chat surveys, articles, or comments are linked on the request in a related list.
- If the issue cannot be resolved on the first interaction, the information on the request will be used to create activities for follow up.
- Automatic activities can be created when a customer calls, chats, or sends a question.
- If additional activities are required, they can be created manually.

Home page—client partner view

- Key features:
  - Navigate to other tabs
  - Search for a request or activity number
  - Select a recently viewed record
  - Create a New request
  - Provide additional information to help resolve requests.
  - See request status.
  - See resolution of requests.



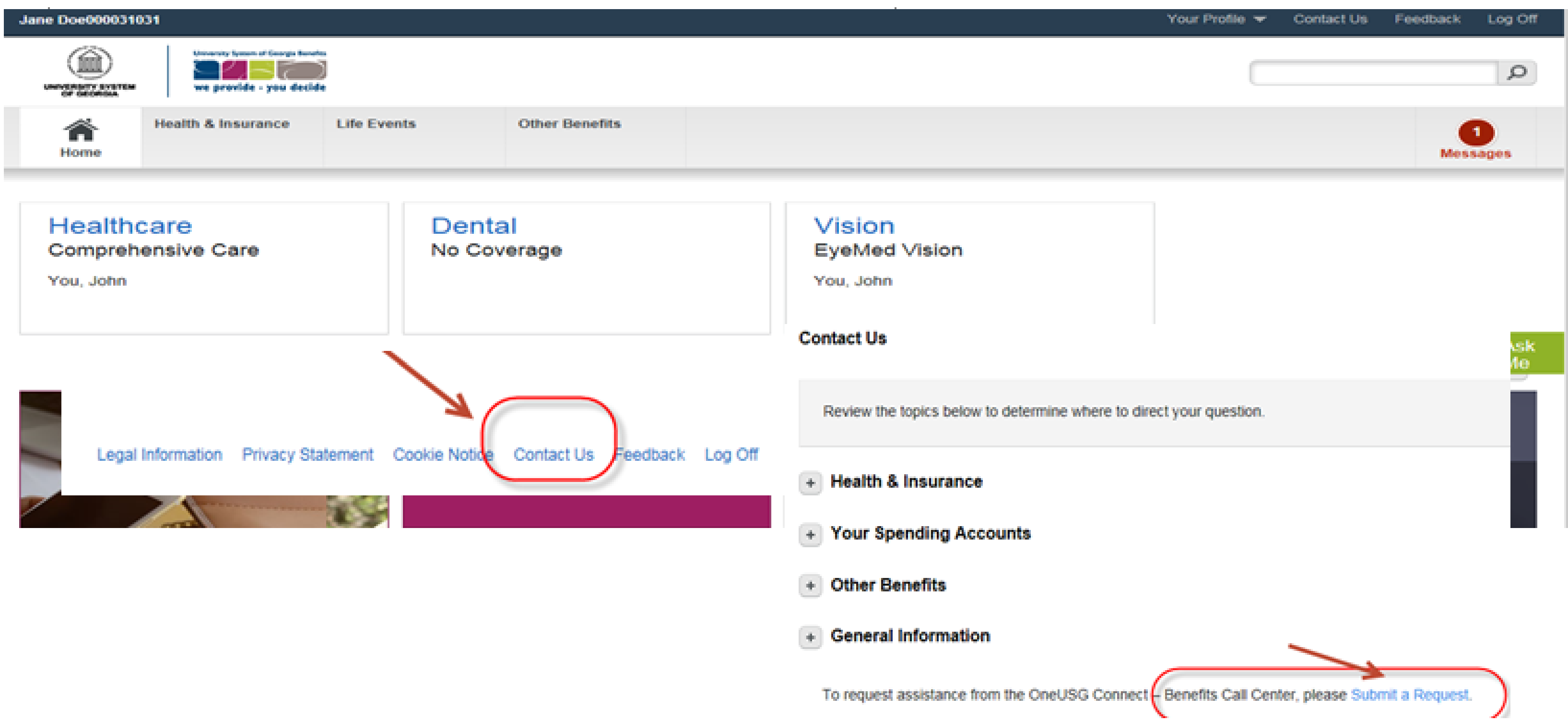
Accessing FAQs



Accessing Service Connect

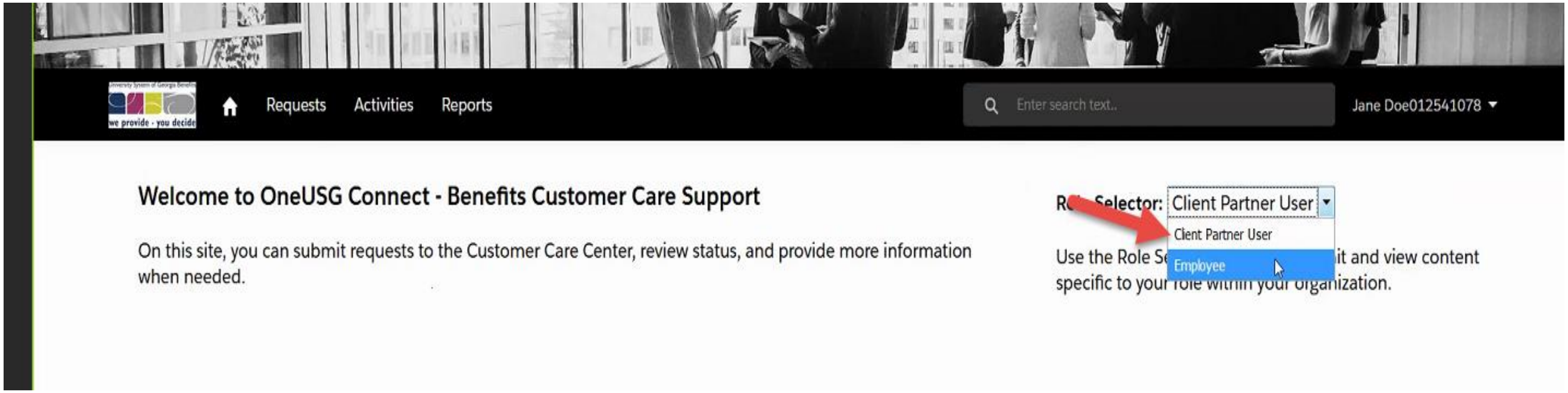
- Service Connect has a customer-facing portal available to employees, managers, and client partners.
- Users access Service Connect via a Single Sign-on (SSO) link from HR Connect via the tiles on the Contact Us page.
- No separate Service Connect credentials required.

- Service Connect can be used to:
  - Submit requests.
  - Provide additional information to help resolve requests.
  - See request status.
  - See resolution of requests.
  - Run reports (select users).



Role selector

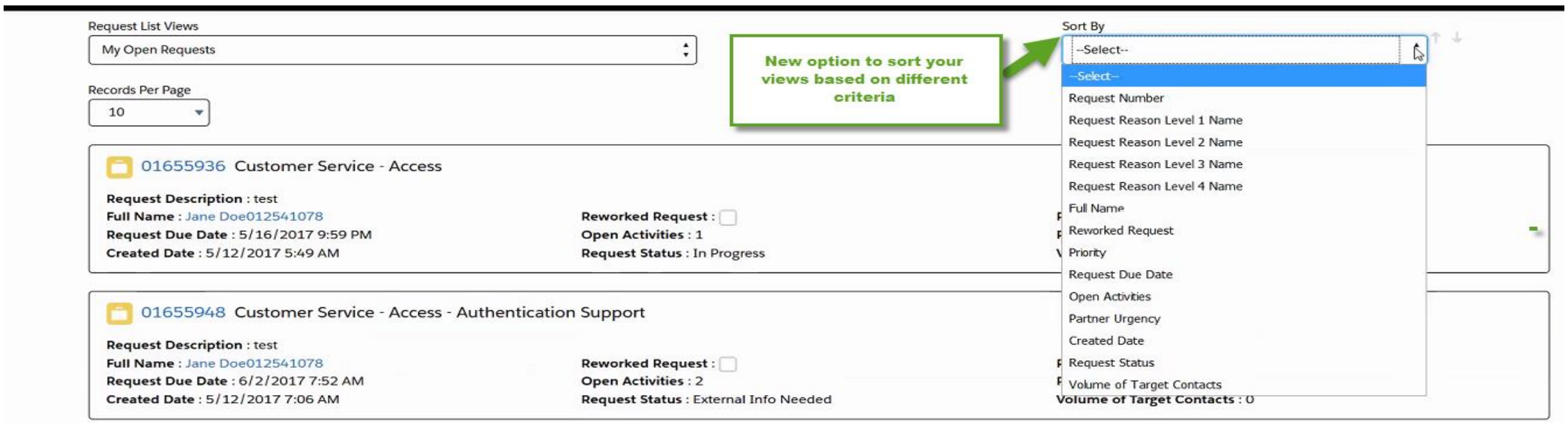
- Views and permissions vary in Service Connect.
- Since you have more than one role, you should select the role you are acting in at a point in time. For example, if asking a personal question, you should select the role of employee when submitting your request; if asking a job-related question about another employee, select client partner role.

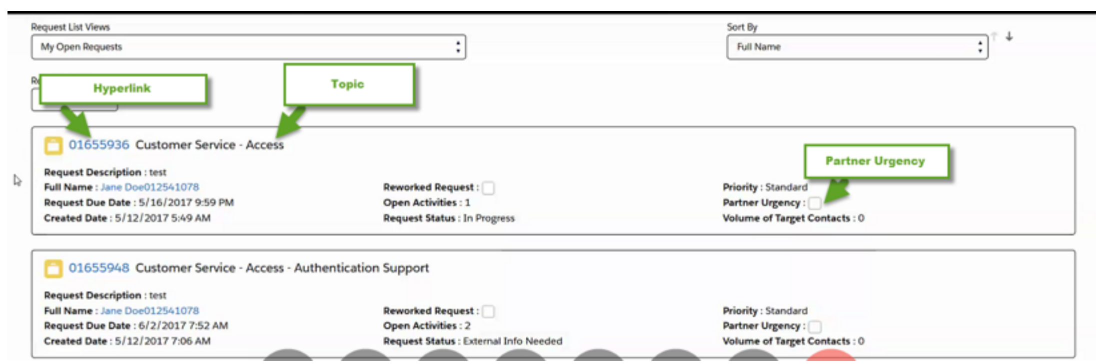


alight

Requests tab—client partner view

- Key features:
  - Always brings up view of recent items or create a new activity.
  - Select from multiple list views to see different displays of requests.
  - You can sort by a variety of topics





Request “In Progress”—client partner view

When the request has been submitted, you can:

- View the request.
- Create a new activity.
- Add or view a comment.
- **Examples of when to add a comment:**
  - Provide additional detail about the request description.
  - Inquire about the status of the request.
  - Ask for the request to be cancelled (users can only cancel if no action has been taken by Alight).
  - To direct that an **already created** request be **escalated.**
- It’s unlikely you would add a comment to a request if you were NOT the contact on the request.
- **Add an attachment:**
  - Most common file extensions allowed (e.g. .docx, .ppt, .xls, .png, .gif, .jpg, .zip).
  - File names may **not** contain spaces or special characters.

- **Add a Target Contact**

  Target contacts are the people who the Request is about/for

  They are not aware of the Requests about/for them, unless explicitly involved
- **Close a Request**

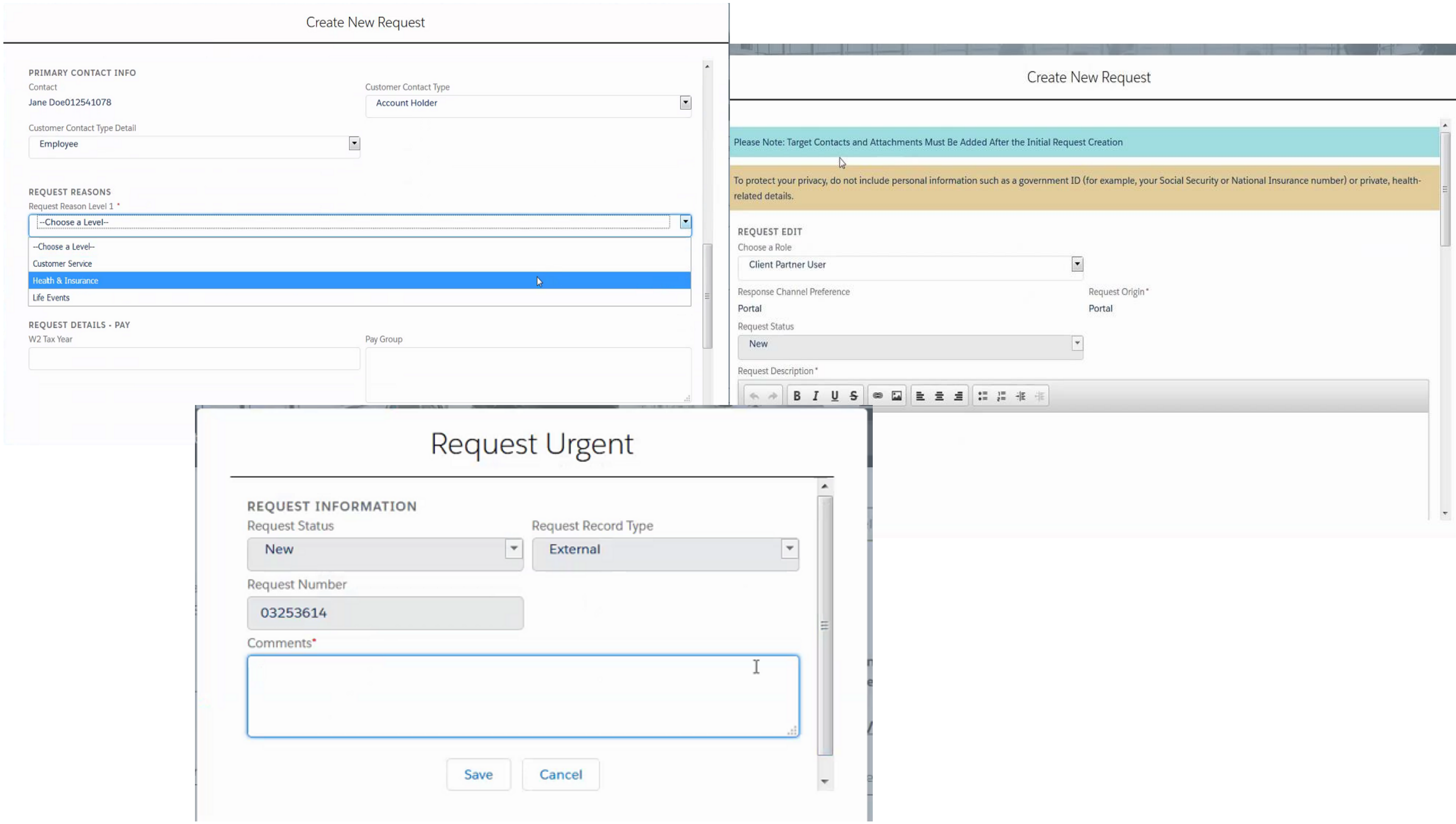
  Can be done if no action has been taken; Requests Status is New

  Will actually cancel the request and indicate it’s no longer needed

alight

Activities tab—client partner view

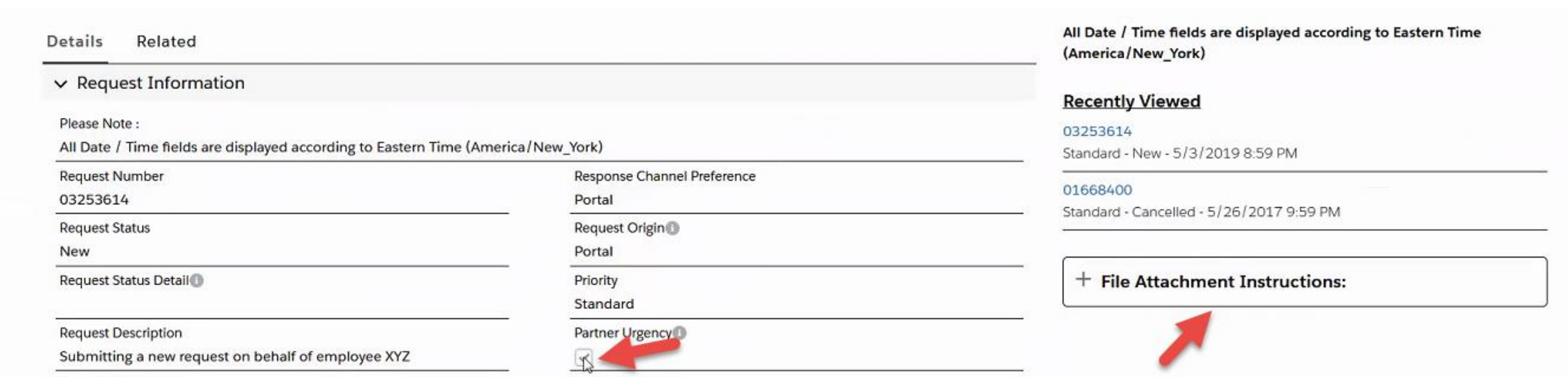
- Key features:
  - Creating a new request using the new URGENT feature



alight

Activities tab—client partner view

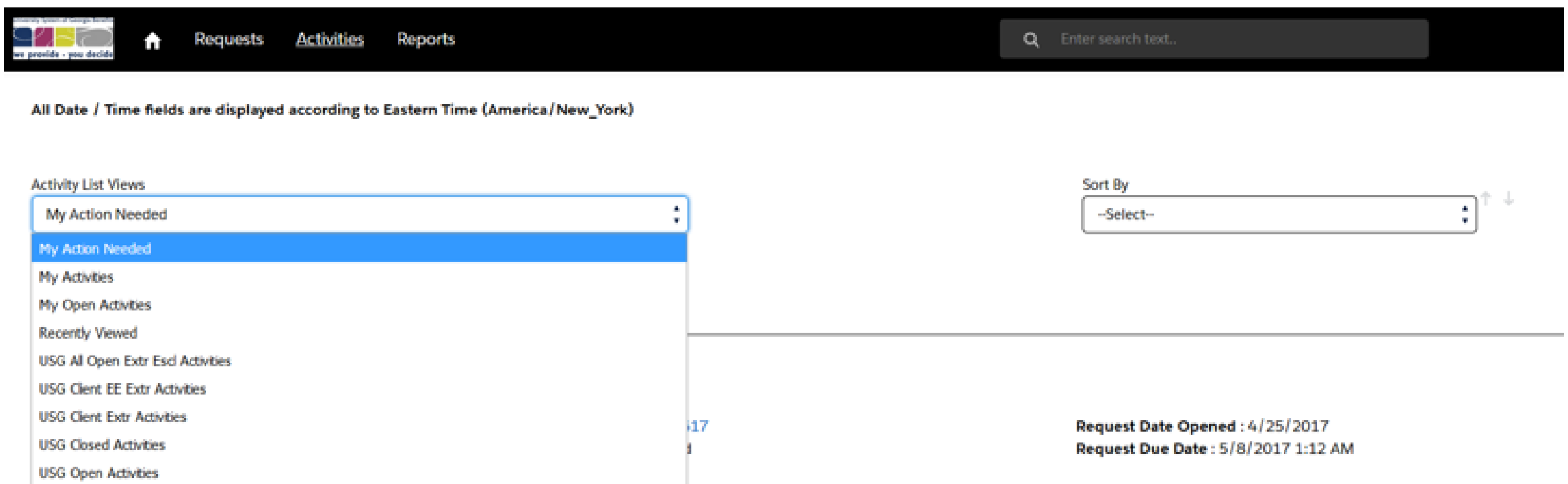
- Key features:
  - New Features offered when creating a new request
    - using the new URGENT feature
    - Attach files



Activities tab—client partner view

- Key features:
  - Always brings up view of recent items.
  - Select from multiple list views to see different displays of activities.
  - You can sort by recently viewed, recently created, and recently modified.

- Activities



Managing work in Service Connect

Requests

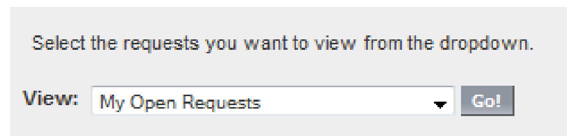
- Request list views allow you to see requests that you submitted as well as any others you to which you have access.
- Use the list views to check on your requests or to see what is happening on requests for your service area.
- Reports can also be used to filter and summarize requests as needed.
- Escalation list view highlights all open requests that are escalated.
  - Other list views display an indicator if the request is escalated.

Activities

- Activity list views allow you to see any activities that are assigned to you as the contact.
- You also have visibility to activities tied to requests for your service area, regardless of the contact.
- My Activities allows you to see the items that are assigned to you.
  - They are of the type “External Needs More Info”, and have a status of “Question Pending”.

Using list views—requests

- List Views provide Service Connect users with a way to see different groupings of requests.
- The records visible to the user in the list view are only those they have access to read.
  - Columns provide details and hyperlinks to applicable records.
  - Columns vary in list views to show relevant info.
  - Access to list views varies by role.
- Select the view you want, and press Go!



Request View	Description
All Open External Escalated Requests	Shows all Requests that have a Priority of External Escalation
USG Open Requests	Lists all Requests that are open
USG Closed Requests	Lists all Requests that are closed
USG All Requests	Lists all Requests
My Closed Requests	Shows all closed or cancelled Requests where you are the Contact
My Open Requests	Shows all open Requests where you are the Contact
My Requests	Shows all Requests where you are the Contact

Using list views—activities

- There are similar list views for activities (e.g. My Open Activities) as described for requests.
- Some additional activity list views allow a client partner to see activities of the “External Needs More Info” type that have a status of “Question Pending” for a client user.
  - You can only see activities in the list views you would normally have access to see.

Activities View*	Description
USG Client Extr Activities	Displays Activities with an External Information Source of “Client”
USG Client EE Extr Activities	Displays Activities with an External Information Source of “Client Employee”
USG Closed Activities	Lists all Activities that are completed/done
USG Open Activities	Lists all Activities that are not completed/done
USG Open External Escalated Activities	Displays Activities on a Request that has a Priority of External Escalation
USG All Activities	Lists all Activities
My Action Needed	**Lists All Question Pending Activities Assigned to you**
My Activities	Lists all Activities where you are the Contact
My Open Activities	Displays all open Activities where you are the Contact

***Note:** *List view names may be abbreviated in Service Connect due to character limits.*

How to manage my daily work

- Watch for email notifications from OneUSGConnectBenefits@alight.com, namely those with subject line *“Request Needs Your Attention*”.
- Tasks assigned to me:
  - Go to activities tab.
  - Select **My Action Needed** and hit **Go.**
  - Click the activity hyperlink to view details and edit.
- Reports:
  - Select report, export to Excel, then apply filters based on your need (i.e., owner, contact, activity type, due date, worksite code).
  - Recommended reports:
    - Activities Open.
    - Activities Open Due Today.
    - Activities Open Overdue.

HR client partner access

REMINDER:

As a Client Partner in Service Connect, you have visibility to:

- All Requests and Activities you create;
- Activities assigned to you; and
- Requests within your assigned Service Area.

If you require more restricted access (Service Areas), please contact , Theresa Wood to discuss.

Service Areas:

- Customer Service
- Health & Insurance
- Life Events

If you require user access to the Service Connect Support tools, contact your internal administrators located in the USG Shared Support Center

- Primary: ttaylor@ssc.usg.edu; ggiles@ssc.usg.edu
- CC Email: Oneusg_notifications@usg.edu
- USG Security Managers: Tony Taylor, Stephen Hutchinson, Stephanie Marshall

4

Discussion and questions