



How To Create Social Employer Benefit Portals

This is a basic overview of Social Employer Benefit Portals and how to create them using Salesforce Chatter Groups

For more information contact sales@benefitsguide.com or call 646-461-3000

Agenda

- What is a Social Employer Benefit Portal?
- What are the Advantages of Creating a Social Employer Benefit Portal for your Clients?
- How To Create a Social Employer Benefit Portal with Salesforce Chatter
- What to include?
- Who to invite?

What is a Social Employer Benefit Portal?

A Social Employer Benefit Portal is a private branded social community that is designed for you and your clients to share information and communicate about their employee benefit administration.

What are the Advantages of Creating a Social Employer Benefit Portal for your Clients?

- Connect your company with your clients
- Clients can quickly find the information they are looking for and can communicate with your staff and other members of the Group as needed.
- All of the activity from all of your Chatter Group's will roll up to the Feed on your Home page in your Agency Management System
- Receive emails updates on a scheduled basis or even upon specific event triggers.

What are the Advantages of Creating a Social Employer Benefit Portal for your Clients?

- This will entirely transform your client's self-service experience
- People are comfortable using social media to share information and to communicate with friends and colleagues
- Anywhere, Anytime, Any Device
- Low Cost, High Impact way to improve client service, retention and new business sales

Social Employer Benefit Portal

What to include?

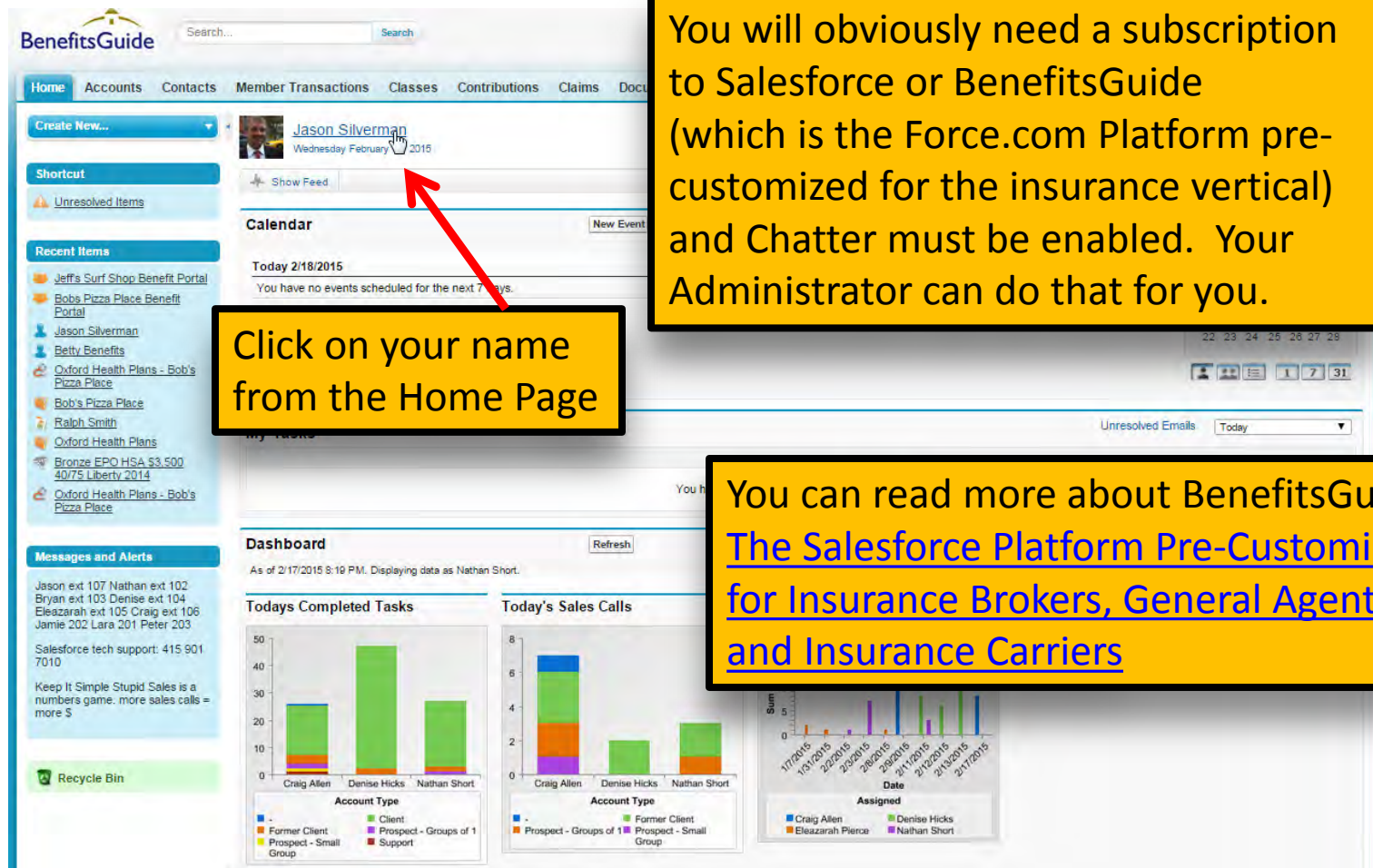
- Benefit Summaries (SPD's)
- Forms needed for plan administration
 - Enrollment Change, Medical Claim, Rx Mail Order, Gym Reimbursement
- Information about value added services
 - Rx Mail Order, Gym Reimbursement
- Links to provider network lookup tools
- Open Enrollment information
- Announcements about benefit changes
- Your contact information or that of the Account Manager
- Anything else that your client may find helpful

Social Employer Benefit Portal

Who to Invite?

- Group Benefit Administrators
- Human Resource Managers
- Owners / Decision Makers

How To Create a Social Employer Benefit Portal with Salesforce Chatter



The screenshot shows the BenefitsGuide interface within a Salesforce Chatter environment. The top navigation bar includes links for Home, Accounts, Contacts, Member Transactions, Classes, Contributions, Claims, and Documents. A search bar is located at the top right. On the left sidebar, there are sections for 'Create New...', 'Shortcut' (with 'Unresolved Items'), and 'Recent Items' (listing various benefit portals like 'Jeff's Surf Shop Benefit Portal' and 'Bob's Pizza Place Benefit Portal'). A red arrow points to the user profile of 'Jason Silverman' in the 'Recent Items' section, with a callout box instructing to 'Click on your name from the Home Page'. Below this, a 'Calendar' section shows 'Today 2/18/2015' and a message: 'You have no events scheduled for the next 7 days.' At the bottom, a 'Dashboard' section displays 'As of 2/17/2015 3:10 PM. Displaying data as Nathan Short.' and includes two charts: 'Today's Completed Tasks' and 'Today's Sales Calls'. A third chart, 'Assigned', is partially visible on the right. A yellow callout box on the right side of the interface states: 'You will obviously need a subscription to Salesforce or BenefitsGuide (which is the Force.com Platform pre-customized for the insurance vertical) and Chatter must be enabled. Your Administrator can do that for you.' Another yellow callout box at the bottom right provides a link to read more about BenefitsGuide: [The Salesforce Platform Pre-Customized for Insurance Brokers, General Agents, and Insurance Carriers](#).

You will obviously need a subscription to Salesforce or BenefitsGuide (which is the Force.com Platform pre-customized for the insurance vertical) and Chatter must be enabled. Your Administrator can do that for you.

Click on your name from the Home Page

You can read more about BenefitsGuide: [The Salesforce Platform Pre-Customized for Insurance Brokers, General Agents, and Insurance Carriers](#)

How To Create a Social Employer Benefit Portal with Salesforce Chatter

The screenshot displays the Salesforce Chatter interface for a user named Jason Silverman. The top navigation bar includes links for Home, Accounts, Contacts, Member Transactions, Classes, Contributions, Claims, Documents, Dashboards, Reports, and Google Docs. A search bar is located on the left, and a 'Broker Management System' button is on the right. The main content area shows the user's profile, including a photo, a 'Moderator' badge, and a 'Complete About Me' section. A red arrow points from the 'Chatter' link in the left sidebar to the 'Chatter' link in the top navigation bar. A yellow callout box with the text 'Then click the link to Chatter' is overlaid on the profile. Below the profile, there are two posts from 'Bobs Pizza Place' (Private With Customers) by Jason Silverman, each containing a PDF summary of an Oxford Plan (Gold and Bronze). The bottom of the screen shows the URL 'https://na10.salesforce.com/ui/core/chatter/ui/ChatterPage' and the date 'January 28, 2015 at 1:20 PM'.

BenefitsGuide

Search...

Jason Silverman Help & Training Broker Management System

Home Accounts Contacts Member Transactions Classes Contributions Claims Documents Dashboards Reports Google Docs

Chatter > People > Jason Silverman

Feed Overview

Post File Link Poll

What are you working on?

Share

Then click the link to Chatter

Complete 'About Me'

Tell people about your role, work history, or expertise. It's all searchable!

Skip >

Contact

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US

Contribution

Active Influencer

28 posts & comments

2 comments received

1 like received

Oxford Plan Summary - Gold

Download pdf (188 KB) More Actions

Comment Like January 28, 2015 at 1:28 PM

Bobs Pizza Place (Private With Customers) — Jason Silverman

This is the detailed benefit summary for the Oxford Bronze plan.

Oxford Plan Summary - Bronze

Download pdf (188 KB) More Actions

Comment Like January 28, 2015 at 1:26 PM

Bobs Pizza Place (Private With Customers) — Jason Silverman changed Access Type from Public to Private and Allow Customers from false to true.

Chat

https://na10.salesforce.com/ui/core/chatter/ui/ChatterPage January 28, 2015 at 1:20 PM

How To Create a Social Employer Benefit Portal with Salesforce Chatter

The screenshot displays the BenefitsGuide interface, which is a Salesforce Chatter-based social employer benefit portal. The top navigation bar includes the BenefitsGuide logo, a search bar, and user information for Jason Silverman. Below this is a secondary navigation bar with links to Home, Accounts, Contacts, Member Transactions, Classes, Contributions, Claims, Documents, Dashboards, Reports, and Google Docs. The main content area is titled 'Total Capital Planning Inc.' and features a sidebar on the left with links to Messages, Feed, People, Groups, Recently Viewed, My Groups, Active Groups, My Archived Groups, Files, and Topics. The 'Groups' section is highlighted with a red arrow. The main content area shows a 'Recently Viewed Groups' section with a search bar and a table of groups. A 'New Group' button is located in the top right corner of the 'Recently Viewed Groups' section, also highlighted with a red arrow. A yellow callout box with a black border and the text 'Click Groups and then New Group' is positioned at the bottom center, with red arrows pointing to the 'Groups' link in the sidebar and the 'New Group' button. The footer contains copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

BenefitsGuide

Search...

Jason Silverman Help & Training Broker Management System

Home Accounts Contacts Member Transactions Classes Contributions Claims Documents Dashboards Reports Google Docs +

Total Capital Planning Inc. Help for this Page

Jason Silverman

Messages

Feed

People

Groups

Recently Viewed

My Groups

Active Groups

My Archived Groups

Files

Topics

Recently Viewed Groups

Type a Group Name...

Group Last Activity Membership

Bobs Pizza Place (Private With Customers)

This Chatter Group contains all of the information on the medical and dental plans for ...

Feb 16

Owner

New Group

Recommendations

Complete your profile

Tell everyone about yourself and upload a photo.

Click Groups and then New Group

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How To Create a Social Employer Benefit Portal with Salesforce Chatter

Best Practice: Create a naming convention for the Group Name.

i.e. Group Name + Benefit Portal such as “Jeff’s Surf Shop Benefit Portal”

Enter a complete description of the purpose for the Group.

You will want to select “Don’t automatically archive this group.”

Group Access should be set to Private and Allow Customers

The screenshot shows the 'New Group' form in the BenefitsGuide system. The form is divided into sections: 'Basic Information' and 'Group Access'. In the 'Basic Information' section, the 'Group Name' field is filled with 'Jeff's Surf Shop'. The 'Description' field contains a detailed paragraph about the group's purpose. Under 'Automatic Archiving', the radio button for 'Don't automatically archive this group.' is selected. In the 'Group Access' section, the 'Private' radio button is selected, and the 'Allow Customers' checkbox is checked. Red arrows point from yellow callout boxes to these specific fields: one to the Group Name, one to the Description, one to the 'Don't automatically archive' radio button, and one to the 'Private' radio button and 'Allow Customers' checkbox.

BenefitsGuide Search... Search

Home Accounts Contacts Member Transactions Classes Contrib

Group Edit New Group Save Cancel

Basic Information Required Information

Group Name Jeff's Surf Shop

Owner Owner

Description This Group contains all of the information needed to manage the employee benefits administration for Jeff's Surf Shop. Members of this group can securely and easily post and share benefit summaries, forms needed for plan administration, information about value added services, open enrollment messages, links to provider network lookup tools, messages about benefit changes and anything else that you might would want to communicate. Members can also communicate directly with their own dedicated account representative, improving the service provided to your clients while also driving down inbound client service calls.

Automatic Archiving

☒ Archive this group if there are no posts or comments for 90 days.

☐ Don't automatically archive this group.

Group Access

☐ Public Everyone can see updates and join.

☒ Private Only members can see updates. Membership requires approval. i

☒ Allow Customers You can invite customers to this group. i

Save Cancel

How To Create a Social Employer Benefit Portal with Salesforce Chatter

BenefitsGuide Search... Jason Silverman Help & Training Broker Management System

Home Accounts Contacts Member Transactions Classes Contributions Claims Documents Dashboards Reports Google Docs

Chatter > Groups > Jeff's Surf Shop Benefit Portal Private

Post File Link More

Share with Jeff's Surf Shop Benefit Portal Share

Show All Updates

Add Photo

Group Settings Chatter Email Settings

Information Add Information

Description

This Group contains all of the information needed to manage the employee benefits administration for Jeff's Surf Shop. Members of this group can securely and easily post and share benefit summaries, forms needed for plan administration, information about value added services, open enrollment messages, links to provider network lookup tools, messages about benefit changes and anything else that you might want to communicate. Members can also communicate directly with their own dedicated account representative, improving the service provided to your clients while also driving down inbound client service calls.

Then, because it is a "social" environment, anyone in the Group with the right permissions can Comment and Like and can Post questions from within the Chatter app on any device, anywhere, anytime.

Owner

Get Chatter Desktop See real-time alerts, drag and drop files from your desktop, and stay connected without your browser. Skip >

Members Show

TOTAL CAPITAL PLANNING INC

CUSTOMERS No customers have been added to this group. Add Members Invite People

Group Files No files have been posted to this group.

Chat

Note: Click "Help for this Page" anytime for detailed instruction specific to the page that you are on when you click the link.

Begin by adding a logo image for this Group, select Add Photo

Now that the Group has been created, you will need to customize it by adding all of the relevant information.

How To Create a Social Employer Benefit Portal with Salesforce Chatter

The screenshot shows the BenefitsGuide Chatter interface for a group named 'Jeff's Surf Shop Benefit Portal'. The interface includes a top navigation bar with links like Home, Accounts, Contacts, Member Transactions, Classes, Contributions, Claims, Documents, Dashboards, Reports, and Google Docs. A search bar and user profile (Jason Silverman) are also visible. The main content area shows the group's profile with a cover image of 'The Wiggles' and a description. A red arrow points to the 'Upload a file from your computer' button in the post creation area.

You can upload a file from your computer or from salesforce

To create a Social Benefit Portal Share with this Group:

- Benefit Summaries (SPD's)
- Forms needed for plan administration
- Information about value added services
- Links to provider network lookup tools
- Open Enrollment information
- Announcements about benefit changes
- Your contact information or that of the Account Manager
- Anything else that your client may find helpful

How To Create a Social Employer Benefit Portal with Salesforce Chatter

You can Share a Link, give it a name and provide a description

Note: The Group Files are displayed in the Group Feed and on the sidebar

Note: When naming files to upload, provide the purpose of the file at the beginning of the filename. This is to improve the usefulness of the links in the sidebar.

How To Create a Social Employer Benefit Portal with Salesforce Chatter

The screenshot displays the BenefitsGuide Chatter interface. At the top, there's a navigation bar with 'Home', 'Accounts', 'Contacts', 'Member Transactions', 'Classes', 'Contributions', 'Claims', 'Documents', 'Dashboards', 'Reports', and 'Google Docs'. A search bar and user profile 'Jason Silverman' are also visible. The main content area shows a group post for 'Jeff's Surf Shop Benefit Portal' (Private). The post includes a cover image with 'SURFER JEFF' and 'The Wiggles' text, a text announcement about an Open Enrollment Meeting on Monday, April 20, 2015, and an expiration date of 4/20/2015. A red arrow points from a yellow callout box to the expiration date. Below the announcement, there's a link to 'Oxford Provider Search Lookup' with a URL. Another red arrow points from a second yellow callout box to this link. The right sidebar shows 'Group Files' including 'Oxford Gold Benefits', 'Oxford Bronze Benefits', 'Enrollment Change F...', 'Gym Reimbursement ...', and 'Medical Claim Form ...'. A 'Chat' button is at the bottom right.

Post an Announcement with an Expiration Date so that it is automatically removed from the Group when it expires.

Note: The Shared Link, Link Name and Link Description appear in the Group Feed

Sample Social Employer Benefit Portal with Salesforce Chatter for Bobs Pizza Place

Next, Click Chatter Email Settings

Group Members can Post a message to the Group Feed, and Comment and Like a Post

Note: The Announcement appears in the sidebar and in the Group Feed.

The screenshot displays the 'Surf Shop Benefit Portal' group page. The top navigation bar includes 'BenefitsGuide', a search bar, and user information for 'Jason Silverman'. The group name 'Surf Shop Benefit Portal' is marked as 'Private'. The main feed shows a post by Jason Silverman about an 'Open Enrollment Meeting on Monday, April 20, 2015'. The left sidebar contains 'Group Settings' and 'Chatter Email Settings'. The right sidebar lists 'Members' (TOTAL CAPITAL PLANNING INC.), 'CUSTOMERS' (no customers added), and 'Group Files' (Oxford Gold Benefits, Oxford Bronze Benefits, etc.).

How To Create a Social Employer Benefit Portal with Salesforce Chatter

The screenshot shows the 'Email Settings' window in Salesforce Chatter. It is divided into three main sections: 'General', 'Personal', and 'Groups'. The 'Personal' section is expanded, showing various notification categories with checkboxes. A red bracket groups the 'Personal' and 'Groups' sections. A red arrow points from a yellow callout box to the 'Groups' section. Another yellow callout box points to the 'Personal' section. The 'Groups' section at the bottom lists two groups: 'Bobs Pizza Place Benefit Portal' and 'Jeff's Surf Shop Benefit Portal', each with a dropdown menu for email frequency.

General
Receive emails

Personal
Email me when someone:

- Follows**
Follows me
- Posts or Likes**
Posts on my profile
Shares a post I made
Likes a post or a comment I made
- Comments**
Comments on my status or a change I made
Comments on a post on my profile
Comments after me
Comments on an item I bookmarked
Comments on an item I like
- Mentions, Messages, or Endorsements**
Mentions me in a post
Mentions me in a comment
Sends me a message
Endorses me on a topic

Set frequency for personal digest:
Daily
Weekly
Never

Groups
Set default frequency for groups I join:

- Email on each post
- Daily digests
- Weekly digests
- Never

Group	Email on Each Post	Daily Digests	Weekly Digests	Never
Bobs Pizza Place Benefit Portal				
Jeff's Surf Shop Benefit Portal				

Note: You can manage your Chatter Email Settings for all of your Chatter Groups here

Best Practice: Take time to understand the options for your Chatter Email Settings

How To Create a Social Employer Benefit Portal with Salesforce Chatter

The screenshot shows a Salesforce Chatter group page for 'Jeff's Surf Shop Benefit Portal'. The page includes a search bar, navigation tabs (Home, Accounts, Contacts, Member Transactions, Classes, Contributions), and a group profile picture. The main content area displays a post by Jason Silverman about an Open Enrollment Meeting. To the right, there is a 'Members' section with a list of members and a 'Group Files' section with a list of files. Two red arrows point from yellow callout boxes to the 'Add Members' and 'Invite People' links in the 'Members' section.

BenefitsGuide Search...

Home Accounts Contacts Member Transactions Classes Contributions

Chatter > Groups > Jeff's Surf Shop Benefit Portal Private

Post File Link More

Share with Jeff's Surf Shop Benefit Portal

Show All Updates

Jason Silverman

There will be an Open Enrollment Meeting on Monday, April 20, 2015 in the Employee Lounge. This meeting is mandatory for all Full Time Employees.

Comment Like Today at 10:41 AM

Jason Silverman

Use this link to search for doctors in Oxford's provider network.

Oxford Provider Search Lookup
https://www.oxhp.com/secure/providerSearch/content_doctor.html

Comment Like Today at 10:34 AM

Jason Silverman

This is the SPD for the Oxford Gold plan.

Oxford Gold Benefits
Download pdf (198 KB) More Actions

Comment Like Today at 10:30 AM

See real-time alerts, drag and drop files from your desktop, and stay connected without your browser.

Skip >

Members Show All (1)

TOTAL CAPITAL PLANNING INC.

CUSTOMERS

No customers have been added to this group.

Add Members

Invite People

Group Files Show All (6)

Oxford Gold Benefits

Oxford Bronze Benefits

Enrollment Change F...

Gym Reimbursement ...

Medical Claim Form ...

Chat

First, Add Members. These are BenefitsGuide or Salesforce Users who are the Account Managers.

Then, Invite People. These are the Group Benefit Administrators who work for your client. They will each get a Chatter Free license.

How To Create a Social Employer Benefit Portal with Salesforce Chatter

BenefitsGuide Search Jason Silverman Help & Training Broker Management System

Home Accounts Contacts Member Transactions Classes Contributions Claims Documents Dashboard

Chatter > Groups > Jeff's Surf Shop Benefit Portal Private

Post File Link Announcem...

Invite People to Group

To: Enter email addresses separated with commas

Message

Jason at Total Capital Planning Inc. invited you to join the Chatter group Jeff's Surf Shop Benefit Portal. Join to access the group's updates and files, and collaborate with other group members.

Jason Silverman says:

Add an optional message...

Send Cancel

Group Settings Chatter Email Settings

Information Add Information

Description

This Group contains all of the information needed to manage the employee benefits administration for Jeff's Surf Shop. Members of this group can securely and easily post and share benefit summaries, forms needed for plan administration, information about value added services, open enrollment messages, links to provider network lookup tools, messages about benefit changes and anything else that you might want to communicate. Members can also communicate directly with their own dedicated account representative, improving the service provided to your clients while also driving down inbound client service calls.

Jeff's Surf Shop Benefit Portal (Private With Customers) — Jason Silverman

This is the SPD for the Oxford Gold plan.

Oxford Gold Benefits Download pdf (198 KB) More Actions

Gym Reimbursement ... Medical Claim Form ...

Chat

Simply provide an email address and a message explaining the invitation to join this Social Employer Benefit Portal

How To Create a Social Employer Benefit Portal with Salesforce Chatter

On Thu, Feb 19, 2015 at 10:50 AM, Salesforce Chatter <noreply@chatter.salesforce.com> wrote:

Jason Silverman (Total Capital Planning Inc.) added you to the group **Jeff's Surf Shop Benefit Portal** (Private With Customers).

The People that you invite to the Group will get an email that looks something like this.



Jeff's Surf Shop Benefit Portal (Private With Customers)

To view this group, go to:

<https://na10.salesforce.com/0> ?fromEmail=1

This email was sent to the user jason: @guest.benefitsguide.com.

To change or turn off Chatter emails, use your registered username to [log in](#).



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Social Employer Benefit Portals with Salesforce Chatter

- **BenefitsGuide is integrated with Salesforce Chatter.**
- **BenefitsGuide is an insurance agency management system that streamlines the process of selling and servicing insurance from the perspective of the broker, general agent and insurance carrier and it is built entirely on the salesforce Force.com Platform.**
- **For more information call 646-461-3000 or email sales@benefitsguide.com.**