



***“What a difference a Guru makes!  
Are you a Guru?”***

**Key Differentiators**

**Employee Hand Books**

*Agents will be able to help their clients or prospects create their own customized employee handbook. (Did you know that almost 50% of all small employers do not have a hand book?) This is a great way to help a client or a prospect minimize future problems by having a written guide to follow.*

**Monthly Newsletter**

*Agents can now send monthly PDF newsletters to all of their prospects using our Managed HR Portal. We provide a new newsletter ever month at no additional charge.*

**Total Compensation Statements**

*Agents can create customized employee benefit statements for their group employees. This is a great way to help your groups share all the benefits options that they pay for in one comprehensive annual statement.*

**BASIC Discounts**

*We offer a 10% discount on COBRA, HSA, HRA and FSA administration. Your clients who currently use a payroll vendor can save up to 13% off their current payroll invoice. Finally, we offer our Premium Only Plan for only \$95 to BASIC Guru Users. **Most of these discounted products pay commission.***

**Accessibility**

*We offer you the ability to upload as many clients, employees and prospects as you want for one flat fee\**

**Key Features & Benefits**

**Agency/Agent Tools**

- *Group Management is used to upload all group information via Excel into your mybasicGURU secured site*
- *Employee Management is used to upload all employee data via Excel into your mybasicGURU secured site*
- *Communicate with HR at your clients or prospects, with the carriers you work with and with the BASIC Guru administrator*
- *Personal Calendar with reminder settings*
- *My Resources allows the agency or agent to pre-load sites that are important to a group*
- *Ticker allows the agency or agent to run a ticker across the bottom of the screen with important information directed to the agent, or the HR administrator. The HR administrator can create a ticker for company employees*
- *My profile allows the agency or agent to update their information as well as upload their license numbers (by agency and agent), and set up continuing education reminders as well commission reminders*
- *Password agency or agent can change password at their discretion*
- *RFP / Proposal Analysis Tool (new February, 2007)*
- *AD Hoc Data Import/Export Tool (new February, 2007)*
- *Mail Merge (new February, 2007)*

- Universal Reminder (new February, 2007)
- Multiple Plan Year Management (new February, 2007)
- Document Filing Cabinet (new February, 2007)

### **Benefits Management**

The tool provides your agency a competitive edge when you are trying to become agent of record. The tool also helps retain your existing Groups by enabling them to manage their employee benefits and perform critical HR functions such as:

- Summary of all benefits that each employee has selected, viewable to them only via user name and password.
- Create census for RFP to your carriers (new 5/25/06)
- Create customized Employee Benefit Statements (new 4/1/06)
- Review premium amounts by benefit plan
- Network options
- Personal calendars for each employer
- Internal communication between the employee and human resources
- Submit personal profile changes directly to human resources
- Access to important forms for the group

### **HRAnswerlink**

These tools provide your clients' HR manager with many unique tools, such as:

- Monthly PDF newsletter that can be sent from BASIC Guru to all of your prospects (new 1/1/07)
- Employer Hand book
- Ask the Pro, Question of the month
- HR Question and Answer Database
- State and Federal Forms

### **Employee Resources**

- Employees have access to your site by user name and password. Employees can quickly review a summary of their benefits as well as their company summary plan description by line of coverage for more detailed information.
- Employees can view their network choice and check on provider status.
- Employees can review brochures of other insurance coverage as well as download important forms from the carriers that their employer works with.
- The employee can communicate with HR as well as submit changes to HR.

### **Integration**

- Integration with BASIC's COBRA Now online tool (new February, 2007)
- Integration with Outlook (new February, 2007)
- Integration with BASIC's Payroll Plus online tool (new February, 2007)

### **Agency Management**

- Branch administration – add in all branches
- Agent administration – ability to add agents by branch location

### **Commission Tracker**

This enables the agency to setup, track and split commission and fees for all agents and sub agents. This system can handle an unlimited number of commissions and fee splits. As commissions are entered into mybasicGURU, the system automatically splits the commission for reporting. Tracking reports can be viewed at the agency level (all agents) or at the agent level. **(Updated in version 2)**

### **Lead Management**

This enables the agency to setup leads, sort the leads by renewal dates, and store notes of conversations throughout the year with a prospect. Send out census forms to prospects with ease. One touch conversion from a prospect to a client with all notes transferring automatically into the employer notes section. **(Updated in version 2)**

