



Use our checklist to compare BASIC Guru to what you use now!

	<i>Yes</i>	<i>No</i>
<p>Audit Compliance Service <i>Online access, distribution and tracking of SBC documents, legal consultation.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Monthly Newsletter <i>The ability to send monthly HTML newsletters to all clients and prospects.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Total Compensation Statements <i>The ability to create customized employee benefit statements for your group employees.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Discounts <i>We offer a 10% discount on COBRA, HSA, HRA and FSA administration. Our Premium Only Plan is only \$95 to BASIC Guru Users.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Accessibility <i>The ability to upload as many clients, employees and prospects as you want for one monthly flat fee.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><u>Key Features & Benefits</u></p>		
<p><i><u>Group Import</u> upload all group information via Excel</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Employee Import</u> upload all employee data via Excel</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Renewal Management</u> allows the agency/agent to manage group or prospect renewals by line of coverage</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Group/Employee Notification</u> provides real-time notification to the agency level when a group or a group employee makes a change to their data</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Communicate</u> via e-mail with your clients or prospects, with the carriers you work with and with the BASIC Guru administrator</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Library</u> create/assign resources (forms, documents or links) to your own online agency library, where resources can be assigned on demand to your groups and employees</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Ticker</u> create multiple tickers that run across the top of the screen with important information directed to employers or employees</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i><u>Password</u> all levels of users can change their passwords on demand</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

HR and Benefits Portal Technology

	<i>Yes</i>	<i>No</i>
<i>Universal Reminder to create/share reminders with your clients and their employees</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Multiple Plan Year Management to archive old benefit information by group, accessible anytime to the agency/agent on demand (your agency could go paperless with this tool)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Notes Management enabling the agency, agent, employer or employee to communicate via notes to each other at anytime in a secure environment</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Bulk E-mail allowing the agency/agent to create e-mail groups and send bcc e-mails directly from BASIC Guru</i>	<input type="checkbox"/>	<input type="checkbox"/>
Employer Benefits Management		
<i>Summary of all benefits that each employee has selected, viewable to them only via secure user name and password</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Create customized Employee Benefit Statements</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Agency/employer both have access to premium amounts by benefit plan</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Network options are viewable by each employee</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Use as the company Intranet, where clients can store important documents and make them available to employees on demand</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Unlimited document storage for each group</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Employees can submit personal profile changes directly to their human resources department</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Access to important forms, documents or links for the group</i>	<input type="checkbox"/>	<input type="checkbox"/>
BASIC hr		
<i>Downloadable and Customizable sample Employee Handbook</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Laws such as COBRA, ERISA, FMLA, HIPAA clearly explained</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Human Resource information including how to do a performance review, interview, hire and terminate</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Hundreds of downloadable forms, policies and checklists</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>HR Tools such as the Job Description Builder and Salary Benchmarking tool</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Downloadable federal, state and OSHA posters</i>	<input type="checkbox"/>	<input type="checkbox"/>
Online Enrollment		
<i>One generic form to pre-populate multiple health insurance carrier applications including medical, dental, vision, life, short term and long term disability</i>	<input type="checkbox"/>	<input type="checkbox"/>

HR and Benefits Portal Technology

	<i>Yes</i>	<i>No</i>
<i>Information is archived for the user so next year's enrollment is even easier</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Electronic signature provides a paperless pre-screening and enrollment process</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Quick census upload for Agent/Brokers to pre-populate employee applications</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Client HR portal provides Enrollment and Exception Reports to track enrollment</i>	<input type="checkbox"/>	<input type="checkbox"/>

Employee Resources

<i>Employees/enrollees can access SBC documents on-demand</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Employees have access to their site by secure user name and password</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>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</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Employees can view their network choices and check on provider status</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Employees can review brochures for other insurance coverage, download important forms from the carriers that their employer works with</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Access nationwide healthcare costs for elective procedures – Healthcare Blue Book</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Free benefit card to receive discounts on Rx, Hearing, Dental, and Vision</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>The employee can communicate with HR as well as submit changes to HR</i>	<input type="checkbox"/>	<input type="checkbox"/>

Product Management

<i>Add customized summary plan descriptions (PDF or URL link) to your own products library to assign directly to your group on demand</i>	<input type="checkbox"/>	<input type="checkbox"/>
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Commission Tracker

<i>Setup, track and split commission and fees for all agents and sub agents. As commissions are entered, the system automatically splits the commission for reporting</i>	<input type="checkbox"/>	<input type="checkbox"/>
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Prospect Management

<i>Enables the agency to setup prospects, sort prospects 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.</i>	<input type="checkbox"/>	<input type="checkbox"/>
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Carrier Management

<i>Allows you to select carriers that your agency works with as well as create an agency contact database. You can add additional carriers to your database at any time</i>	<input type="checkbox"/>	<input type="checkbox"/>
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HR and Benefits Portal Technology

	<i>Yes</i>	<i>No</i>
Continuing Education (CE) Management		
<i>Keep track of agent continuing education requirements</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Create CE completion reminders for each agent</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Track completed classes</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>System identifies remaining hours to meet state requirements</i>	<input type="checkbox"/>	<input type="checkbox"/>
Reports		
<i>Summary of benefits for all lines of coverage by employer group for easy viewing</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Client/Prospect renewal report</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Employee election report</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Commission summary by employer</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Continuing education credits report</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Agency Book of Business report</i>	<input type="checkbox"/>	<input type="checkbox"/>