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# Receiving Assignment Notices

## Where do the meeting notices come from?

* Assignment notices are emailed to you from [meeting@benefitprojects.com](mailto:meeting@benefitprojects.com)
* Respond directly to this email; this box is continually monitored and emailing this address will ensure your response is processed in a timely manner.
* Respond via e-mail only, not by phone. The time of the email response is the primary factor in determining who is assigned the event. People with smartphones are at a significant advantage. Phone calls will not be taken into account.

## Who gets notified of meetings?

* If a benefit educator is requested on the meeting, they are offered the meeting first.
* Next, time permitting, TBC looks to see if this is an employer whose meetings have been done in previous years. If the benefit educator had received good feedback from the employer, they are offered the meeting.
* If those criteria are not met, the first five suitable benefit educators closest to the meeting site are contacted.
  + This is determined geographically by zip code.
  + Suitable benefit educator means: ensuring the benefit educator has positive feedback, passed all the quizzes necessary to conduct the meeting, is certified to conduct the required presentation, etc.

## Should I answer the request if I am unavailable?

* Yes, you must answer all requests. This is how TBC determines if benefit educators are still interested in conducting meetings. If you do not respond to each assignment request, TBC will stop sending notices to you.

## If I have a limited schedule, should I let you know?

* Yes, TBC should be notified when:
  + you are on vacation
  + you have accepted a contract or cannot work for a specific period
  + your availability is restricted to certain dates or times
  + you need advance notice to accept meetings or have limitations on your ability to travel
* If your return date is open-ended or your reduced schedule is indefinite, email us when your situation changes or let us know when you would like to be contacted for an update on your status.

## Once I respond, when will I know if the assignment is mine?

* Once a notice is sent out, primarily whoever responds first receives the assignment. We try and tell you as soon as we can, but sometimes it may take a few hours for you to be notified.
* If you are not getting a response email from us within 24 hours, please let us know. There may be a problem with your email.
* Do not call TBC to inquire if the meeting is yours or to respond that you are available. We will only consider emailed responses when assigning the meetings.

## What information should my response contain?

* If you are unavailable, a simple no or similar response will suffice.
* If the answer is yes, please tell us if you are available and any specific requirements you may have.
  + For example, Yes – but I would need a hotel the night before.

## What does a meeting request look like?

* A sample meeting notice is located below.

FROM: [jessica@benefitprojects.com](mailto:jessica@benefitprojects.com)

SUBJECT: 136213S1 ~ San Antonio  TX  ~  6/7/2018 9:00 AM CRM:0013816

Who can do this? Please respond either way.

If you will require any travel, you MUST let us know at this time with your preferences. This is necessary for travel approval.

If the meeting location is more than 150 miles from your house, our client requires the use of a rental car. Rental cars will now be paid by TBC and no holds will be placed on your personal credit cards.

 UHC - Key Account   Benefit Fair / Q&A

San Antonio, TX    78221

6/7/2018 9:00 AM - 6/7/2018 12:00 PM

Thanks!

* The subject line will always include: the type of meeting (UHC, 401(k) or similar client information), the date, the times, the city and an internal code in parenthesis followed by the initials of the TBC employee sending out the request.
* The body of the email will always include:
  + Meeting specifics – benefit fair vs. presentation.
  + The date, time and location.
  + The zip code so you can determine how far away you are from the meeting location.
* Also included may be any specific requirements or information such as kick off calls, language requirements, equipment needs, etc.

## What if I was wrong in accepting and I have a conflict?

* Double check your schedule, childcare, or other obligations before accepting a meeting.
* TBC tracks the number of times benefit educators withdraw from assigned meetings. While we understand emergencies arise, when someone withdraws from an assigned meeting, an enormous amount of work ensues for TBC and our clients. The number and type of back outs are considered when future events are assigned. Therefore, excessive back outs (more than three assignments) will lead to the enroller receiving a strike under the Consultant Review Policy. Information on the Consultant Review Policy can be found in the **After the Meeting** section of the handbook.

## What is the difference between the terms Client and Employer?

* Client refers to the company you will be representing at the meeting, for example UnitedHealthcare or Lincoln Financial Group
  + This term is used interchangeable with Vendor on the Assignment Form.
* Employer is the company or location at which you are representing the client. For example, you will be doing a UHC (client) meeting at T-Mobile (employer).

## Why is there not more information in the notice?

* Due to privacy concerns on the part of our clients, this is all the information we can provide you before you accept a meeting.
* If you have done this client before, or there are particular circumstances with this client you should be aware of prior to accepting the assignment, we will inform you of this in the meeting notice.

## How long does TBC hold assignments before sending them out?

* We do not hold onto them at all. As soon as TBC receives a meeting, it is sent out to the benefit educators. There is no pipeline and we do not have the ability to forecast where meetings will occur.

# Assignment Confirmation

## What does an assignment confirmation look like?

* If you are assigned a meeting from TBC, the email will look like this:

FROM: [jessica@benefitprojects.com](mailto:jessica@benefitprojects.com)

SUBJECT: 136213S1 ~ San Antonio, TX ~ 6/7/2018 9:00 AM releasemail CRM:0013828

Attached: Guidelines, Assignment Report, (or other client information)

This one is yours. The fee is $\_\_\_. All the information is attached.

You must speak to the site to confirm details including: date, time, address, security, dress code, etc. If you do not reach someone, you must contact TBC two days prior to your event and you must attend the event regardless.

If you arrive at the site without confirming or notifying TBC and the event has been moved to a different date – YOU WILL NOT BE COMPENSATED. Additionally, TBC will issue you a strike.

Please complete your assignment report online at [www.benefitprojects.com](http://www.benefitprojects.com/). In the upper right corner select Consultant Login. Enter your username in the first box and your password in the second box. Enter information into all of the required fields, attach all of your receipts and hit submit. You will receive a confirmation of receipt from us within 48 hours as well as a copy of the form for your records.  Also, please complete the feedback survey after your event that will be emailed to you.

Meeting ID:  136213S1

Customer: (Employer)

Primary Contact: (Client Name & Contact Info)

Secondary Contact: (Client Name & Contact Info)

Meeting Location:    
(Address)

Site Contact: (Employer Name & Contact Info)   
Meeting Time:

6/7/2018 9:00 AM - 6/7/2018 12:00 PM   
  
Enroller Languages Requested: (If applicable)   
Meeting Type: (Ex. Benefit Fair or Presentation)   
Products:   (Products to be covered at meeting)   
Comments: (Any notes or comments to be aware of – sometimes these are internal notes from the client and do not apply to you)

Attachments: (If any)

Please let us know if you have any questions.

Thanks!

## What are the attachments?

* Attached to every meeting are the TBC Guidelines and the Assignment Activity Report. All the client and meeting detail information we have will be included in the body of the meeting assignment email. If there are multiple locations for a meeting assignment, the meeting details may sometimes appear as attachments.
* The TBC Guidelines are theDo’s and Don’ts for all assignments and should govern your behavior. Failure to follow any of these guidelines can result in termination or receipt of a strike.
* The Assignment Report is to be completed by the benefit educator at the conclusion of the meeting for reimbursement of fees and expenses. Please see the **After the Meeting** section for more details.
* The meeting details are provided by the client and will highlight the specifics of the meeting. This information will be cut & pasted into the body of each meeting assignment email.

## Can you give me more information on the Meeting Details?

* A complete example follows this section, but pay close attention to the following:
* The UHC **Primary Contact** is the person you will reach out to in order to introduce yourself and set-up a day/time where you may both review the meeting and plan details. A **Secondary Contact** is listed and should only be used in the event you have tried multiple times to reach the primary contact without success.
* The location of where the meeting takes place is followed by your site contact. These details must always be confirmed with someone at the site.
* **Meeting Type** lists what the event will be; Benefit Fair, Health and Wellness Event, Formal Presentation, Question and Answer Session or Customer Presentation (i.e. the HR department is doing a presentation on all the benefits and you are to speak briefly about UHC).
* If you were requested for this event, your name would be listed as the **Requested Enroller**. If someone else’s name appears here, do not worry, the meeting is still yours as they were likely unavailable.
* If a specific language is needed it will be listed next to, **Enroller Languages Requested**. If you do not speak the language listed, please reach out to TBC to make sure this event was not assigned to you in error.
* Please also review, Business Attire and Technology and confirm with the client and site location.
* Finally, travel details are for internal use only.

**Below is an example of UHC meeting assignment details that would appear in your assignment email:**

Meeting ID: 107462S1

Customer: APWU

Primary Contact: Janelle Erikson, 952-979-5756, [janelle\_erikson@uhc.com](mailto:janelle_erikson@uhc.com)

Secondary Contact: Sue Kelley, , [sue\_kelley@uhc.com](mailto:sue_kelley@uhc.com)

Segment: National Account

Meeting Location: , 200 industrial avenue, , Teterboro, New Jersey, 07699

Site Contact: Gerard LaMagra [gerard.j.lamagra@usps.gov](mailto:gerard.j.lamagra@usps.gov) 201-375-4180

Open Enrollment Period: 11/09/2013 to 12/09/2013

Number of Employees: 600

Mandatory Attendance: No

Meeting Date: 11/21/2013

Meeting Time: 05:00 PM to 06:00 PM

Meeting Type: Benefit Fair / Q&A

GL Code: 20020 02850 USASS800 74660 220890 0000003269

Requested Enroller:

Enroller Languages Requested:

Required?

Products? Choice Plus Plan with Health Reimbursement Account (HRA)

Product Comments:

Attire: Business Casual

Technology to be provided by enroller:

Will travel be approved? No

Up to how much? $

Comments: Please attend a kick off call for this customer. Held every Friday from October 18, 2013 to Friday, December 6, 2013

Time: 8:00 am, Mountain Daylight Time (Denver, GMT-06:00)

Meeting Number: 823 541 066

Meeting Password: apwuhp

1. Go to <https://uhc.webex.com/uhc/j.php?ED=192984907&UID=0&PW=NNWY4OGMyYzVk&RT=MiM2>

Attachments:

Please visit [www.p3uhc.com](http://www.p3uhc.com) to assign an Enroller.

## Why doesn’t TBC send me the benefit or plan summaries?

* TBC will send you all the information we receive from the client. Oftentimes this does not include the Benefit or Plan Summaries. You must contact the client account team to receive additional information. (See preparing for a meeting)

## Will the client send me a confirmation?

* UHC will send you a Final Approval confirmation email. Review this email and compare to the meeting details sent to you from TBC to double check you are assigned to the correct meeting.
* For the most part, for other clients, such as 401k or other vendors, you will not receive a separate meeting confirmation.

## How is my fee calculated?

* Primarily, the fee is determined by the amount of time it takes to travel to and from the meeting and how long you are at the site. If a condition of the meeting changes after the fee is given it may be reevaluated.
* Other factors include but are not limited to: the type of meeting (benefit fairs vs. presentations) requested special skills (languages, licenses, etc.) and overnight stays.
* Preparation time, including kickoff calls, is a requirement of accepting the meeting.

## Why can’t I find out the fee before accepting?

* Because the fee is calculated based on the travel and site time, this varies by person. We are unable to calculate the fee for everyone offered the meeting. After you accept, the fee is calculated and emailed to you in the confirmation.

## What is the annual agreement?

* You are required to sign and return the contractor agreement every year you are with TBC. This will be emailed to you upon acceptance of your first meeting for that calendar year and details the responsibilities and contract between yourself and TBC.

## What happens if I do not sign the Annual Agreement?

* Unfortunately, if you do not sign the document, we are legally obligated to refrain from sending you assignments. We will terminate your relationship with TBC at that time.

# Preparing for a Meeting

## What if this is my first meeting?

* Each new benefit educator will be sent details to review the First Meeting Brain Shark presentation once they have accepted their first assignment. The presentation is designed to mirror the life cycle of a meeting. Once you have completed the presentation send an email to TBC.

## Who should I contact first?

* Always reach out to the client contact first to introduce yourself unless you receive instructions to the contrary. Since this is their first impression of you, DO NOT indicate that you have not conducted a meeting before or are unfamiliar with the basics.

## Is there anything specific I should discuss with the client contact?

* Ask if there are any changes from the previous year, if there are any new plans or bells and whistles to be highlighted, what the corporate culture is and if there are any areas that he or she would like you to focus on specifically.
* If this is a presentation, ask if there is one prepared for this specific employer.
  + For UHC, if there is not a presentation created, then use the general presentation found at the UHC Enrollment Consultant Portal Site at <http://www.uhcnational.com/enrollmentresource/presentations.html>
* Agree on a plan if there are questions you cannot answer at the site. If the rep is very accessible, they may ask you to call them directly throughout the fair with any questions. More likely, they will like you to take down the person’s name and contact information and a general description of their questions.
  + Do not include personal information with specific medical concerns as it is a violation of privacy laws.
* Do not state this is your first meeting or you are unfamiliar with a product. Account teams at times can be very uncomfortable with external vendors and you do not want to heighten that sensitivity.

## After speaking with the client, who do I reach out to next?

* You must speak to the site to confirm details including: date, time, address, security, dress code, etc.
* Once you have the confirmed location, make sure to get directions using Google maps or something similar. Do this even if you have a GPS system. We advise you to use two different services to get directions as a failsafe.

## What if I cannot get in touch with anyone prior to my meeting?

* If you cannot reach the client or anyone at the meeting location, contact TBC and let us know of your problem. We will try to track someone down for you. Also try the Internet or 411 for alternate phone numbers. Try a main line, and ask the operator for anyone in the HR Department or for your contact.
* If you still cannot reach anyone and the meeting is two days away, please email TBC.
* You must attend the event regardless.
* If you arrive at the site without confirming or notifying TBC and the event has been moved to a different date – YOU WILL NOT BE COMPENSATED. Additionally, TBC will issue you a strike.

## What if the site wants something different than is listed on my meeting request form?

* Since the customer is always right, we strive to accommodate all requests from the meeting location with some exceptions.
* If the site wants additional meetings on another day or to extend your time significantly (4 hours or more), please tell the HR rep that you will get back to them and email us immediately. We have to get approval from the client. If you don’t confirm and receive approval from us, you will not receive additional compensation.
* If the time is not significantly changed, and you are willing to accommodate the request, please just notate the difference on your report and we will adjust the fee if appropriate.
* If the site is requesting you bring equipment you do not have, contact us and let us know. If the client is willing to pay for the rental equipment, we will ship it to you. If you have personal equipment you are comfortable using, please feel free.
* If there are questions about the materials or the giveaways being provided please contact your client contact. For UHC, please contact the UHC account team or UHC Open Enrollment at their hotline 800-718-1257

## How do I get additional information about products listed or UHC Training?

* UHC has an excellent website for benefit educators. Benefit educators should visit this site regularly for updates, training aids, etc. Links to all of UHC’s demos and products are on this site as well as helpful preparation tools.
  + <http://www.uhcnational.com/enrollmentresource/>
* Another great website is Health Care Lane – which provides you with the language UHC would like you to use in explaining their various plans and benefits.
  + [www.healthcarelane.com](http://www.healthcarelane.com)
* UHC has a number of Apps for Smart Phones – DOC GPS and Health 4 Me are great resources to take advantage of at events.

## Are there any UHC websites targeted to cultural communities?

* Yes, UHC has created specific websites where people of similar backgrounds can come together to discuss health issues related to their communities. The sites are listed below.
  + [www.uhclatino.com](http://www.uhclatino.com)
  + [www.uhcasian.com](http://www.uhcasian.com)
  + <http://www.uhc.com/generations_of_wellness.htm> (African American community)

## What about live training resources?

* Every summer UHC offers classroom training in cities UHC expects to be primary markets. All benefit educators are encouraged to attend.
* In depth product webinars are offered throughout the year as well.

## Can I forward the TBC Assigning email to client contacts if they have questions about my meeting?

* No, internal communications from TBC to benefit educators are NEVER to be shared with clients or employers.

## Do I have to attend the kickoff calls for my meeting?

* Yes. Kickoff calls are mandatory and attendance is taken. If TBC knows the date and time of the calls prior to sending the meeting notice out, we will include that information in the email. Do not accept the meeting if you are unable to attend the meeting and the call.
* If we do not know the time, there will be a subsequent email announcing the dates and times.
* We recognize that, especially during the fall, it may be difficult to fit these sessions into a busy schedule. Therefore, often several dates and times are offered.

## What is the Point Person Program?

* For national enrollments with multiple locations throughout the country, TBC designates a fellow benefit educator to act as the Point Person. The Point Person facilitates contact from the account team to the educators and vice versa to ensure all assigned educators receive as much information as possible.
* Benefit educators email their questions about the upcoming meeting to the Point Person, who then answers them or forwards them to the account team. Answers and important information are then shared with the entire team for this client.
* Point People are responsible for answering questions and sharing plan information for that particular client and employer only. Questions about the logistics of the assignment (date, location, time, equipment, etc.) or problems the day of the meeting or at the site (running late, difficult customer, emergency situations, etc.) should only come to TBC.
* If assigned to a meeting with a Point Person do not contact them from the event with questions.

The Point Person will also be doing meetings and you will not receive a timely answer. Contact the account team, but if your fellow benefit educators will benefit from this information, email the point person after the event to share.

# At the Meeting

## What if I show up and the meeting has been cancelled or moved?

* This definitely should not happen, since you have already talked to the HR department and confirmed the date and time. However, if this does occur, please let TBC know.
* If you had previously contacted the site and been told the meeting was at that time and date, you will still be compensated.
* If you had not spoken to anyone at the site, you will not be compensated and issued a strike.
* If the meeting is to be rescheduled and you can accommodate the new date and time, let us know in an email and we will try and make sure you are assigned the meeting again.

## What if the materials have not arrived?

* For UHC meetings, check the tracking number on the event details sheet to see if they have been delivered to HR. If that is not helpful, call the Open Enrollment hotline at 800-718-1257.
* For all other clients, please reach out to your client contact.

## What if the HR Rep or Broker wants to conduct the meeting?

* Let them! It is their meeting to conduct as they wish, but offer to help in any way and be available to answer any client related questions.

## What if I am running late to the meeting?

* Make sure to contact the site directly to let them know, then email or call TBC to let us know as well. Your first call should always be to the site.
* Always make sure you have the Employer HR contact number with you in the event that something happens en route to an event.

## What if I am unable to attend the meeting?

* Call TBC immediately. It is possible we can reschedule, re-staff or arrange transportation to the meeting for you.

## What if I stay later than the meeting was originally scheduled for?

* Note on your Assignment Reports and email us as we will adjust your fee if appropriate. You must contact us if you would like a fee adjustment before you are paid.

## What should I do if I do not know the answer to an employee’s question?

* Make a note of the questioner and questions and communicate the general topic with the account team in the manner you previously decided on prior to the meeting.
* For UHC meetings, do not call the Open Enrollment hotline for plan specific information. This number is staffed by interns who are not capable of getting you the correct information.
  + Feel free to refer people to the 1-800 numbers on the back of their membership cards, www.myuhc.com or dedicated tools for the client.
* However, be wary that you are not referring all questions or concerns in this manner as this will reflect negatively on you.

## Should I answer questions on other products for other companies if their rep is not at the events?

* No, only answer questions for the client and products you are representing, even if you think you know the answer. We do not want you to be given negative feedback or held liable if you answer a question incorrectly.

## What expenses are covered?

* A complete list of the Expense Policy can be found at our website at: <http://benefitprojects.com/consultantsPage.aspx>
* Some highlights:
  + Receipts are required for all expenses – even pre-paid travel.
  + Mileage is paid at the current IRS rate.
  + Meal limits for the appropriate time are: Breakfast - $12, Lunch - $15, Dinner - S25
  + Hotels and airfare are prepaid when approved by TBC. We will reimburse checked baggage fees for lengthy trips or events that require excessive equipment.
  + TBC has a partnership with Enterprise and can prepay any rental car that is rented by Enterprise or National. Other companies we can make the reservation and reimburse the expense of the car.
    - Fuel is also reimbursed – we ask that you return all cars full rather than utilizing services provided by the rental company.
  + Phone calls, printing costs or mailing expenses are not covered unless pre-approved by TBC before the expense report is sent in.

## What should I bring to the meetings?

* For UHC bring your UHC tablecloth, display, clear plastic frame (if you have one), and UHC nametag to all meetings, though they may not all be necessary if it is a presentation.
* Other clients may ship tablecloths or displays directly to you prior to the event and you will be responsible for returning it at the conclusion of the meeting.

## Should I bring my laptop?

* For UHC, if the event details indicate a laptop is requested or you see demos are requested, then yes definitely.
  + If it is not mentioned in the event details, it is still a good idea to bring your laptop, especially to benefit fairs. Running the myuhc.com demo and Storytellers or if wireless internet service is available, logging into pre-member websites or Health Care Lane can draw people to your table.
* Other clients may request demos as well or need laptops for presentations. If you have any questions, please email TBC.

## What if there are leftover materials?

* If they are not client specific, feel free to keep them for future meetings where giveaways or literature have not been provided unless otherwise directed to return them to the client.

## What if someone asks me for a business card?

* You are not allowed to give out personal business cards. TBC does not provide cards indicating you are an outside benefit educator since you are representing a third party client. Please explain that you are not the primary contact and provide the person with the information for someone on the account team.

# After the Meeting

## 

## What do I need to submit for payment?

* The meeting ID and address from your meeting are on the Assignment Report, those must be entered correctly to be paid. Please also note how your name is formatted in the email, submit your name exactly as it is in that email.
* Submit your report via our website - <https://www.benefitprojects.com/expensereport>
* Please note – on the Assignment Report, if you have been shipped a laptop or projector, please check yes on the first question. If you used your personal projector only, check the second box.
* If your event has changed in format or the products you are representing, it is very important to notate this on the form.

## Who will view this report?

* This report is sent to our clients, so be mindful of that fact when completing the form.

## Do I need to include the fee or calculate mileage?

* No, do not include that information. TBC will do all the calculations and double check fees for you.

## Do I need to keep receipts?

* Yes, keep all receipts and submit with the report for reimbursement.
* If you do not submit a receipt we may not be able to reimburse you.
* We do not need original receipts, scanned copies or emailed photos of the receipts are fine.
* Even if your travel was prepaid, submit any of those travel receipts with your payment. You do not need to list them on the report.

## When do I get paid?

* Pay dates occur every Friday.

## Is there a deadline to submit reports?

* Yes, completed reports must be received by 8:00 AM Thursday, Eastern Time, for payment the following week. The cutoff time may change in October and November. Notification will be provided.
* Completed reports means TBC does not have to contact you with questions or to ask you to provide additional information.

## How should I submit the report?

* Expense reports should be submitted through our website. <https://www.benefitprojects.com/expensereport>
* After submitting a report you should receive a confirmation email stating the date your assignment will be paid. If you do not receive this confirmation within a timely manner, please email us to ensure you will be compensated correctly.
* If you realize after you submitted your report that there was something incorrect – you cannot go back and fix it. Please do not resubmit your report, instead please email us at [tbc@benefitprojects.com](mailto:tbc@benefitprojects.com) and let us know what you missed. We will fix the report for you.

## Will the client contact me to find out how the meeting went?

* For UHC, you will receive a survey emailed to you every day until it is completed.
* Other clients may send a survey or email after the meeting.
* It is mandatory that you respond to these requests thoroughly and in a timely manner.

## Will I receive any feedback on how the meeting went?

* You may receive feedback for UHC events. These are completed by HR Reps about your performance approximately 25% of the time. Twice a year TBC compiles that data and emails you a summary.
* If you do not receive an email, it means we did not receive any feedback on you.
* If you have specific questions about feedback, you can always email us.
* If you receive feedback from the account team, please forward to TBC.
* This feedback is made available to all the UHC Account Teams, so they have the ability to request you for future events.
* Feedback is kept for three years.

## How am I evaluated by UHC?

* You are evaluated in 5 areas on a 5 point scale – 1 being Poor, 5 being Excellent.
* The categories are: Rep’s Ability to Answer Questions, Rep Courteous and Respectful, Rep’s Knowledge of Benefits and Products, Rep’s Ability to Engage in Employees, and Satisfaction with Overall Performance of Rep.
* To be considered a benefit educator in good standing, you need to maintain a score of 4.0 or higher.

## What if my feedback is negative?

* TBC will contact you directly if we receive negative feedback.
* If there is not a reasonable explanation for the negative criticism, TBC will issue a strike under the Consultant Review Program.

## What is the Consultant Review Program?

* Essentially, it is a three strikes program. Strikes can be received for failing to show up at a meeting, receiving negative feedback, or not following the guidelines.
* Negative feedback includes comments indicating the benefit educator did not conduct themselves in a manner consistent with professional standards of practice.
* Other behavior possibly resulting in a strike includes, but it not limited to: no showing UHC Classroom Training, not being knowledgeable on UHC’s benefits and products, referring the majority of questions to the HR department, speaking ill of other vendors or plans, excessive withdrawals (three assignments), or not returning rented equipment to TBC in a timely manner.
* Some transgressions may be so egregious, such as soliciting business, that termination results instead of receiving a strike.
* Upon a benefit educator receiving a third strike, the benefit educator’s contract will not be renewed.
* Benefit educators are notified once an issue occurs and are given an opportunity to respond prior to TBC proceeding.
* Once a benefit educator is notified of receiving negative feedback, the benefit educator may not discuss the criticism with the source (the client, HR rep, UHC etc.) or they will be immediately terminated.

## What if I don’t think the meeting went well?

* If you experience problems at the meeting, please call or email TBC and inform us immediately. It is much easier on our end to address any problems that the client may have if we are aware of the situation.

## Should I contact the account team to let them know how it went?

* Yes, at the conclusion of the meeting send the account team a brief note to let them know of any issues or questions from the event.
* Account teams have the ability to request you for future meetings and sending them a brief recap is a mark of professionalism they may remember.

## Should I return the tablecloth and/or displays?

* For UHC, please keep those items for all future UHC meetings.
* Please follow directions provided by other clients.

## Should I return the rented laptop and/or projector?

* Yes, but the timing of the return depends on if the laptop and/or projector was rented for one assignment or for the fall season. If you are in doubt as to which applies to you, please contact our office. TBC is charged when you keep the equipment past the agreed upon date and will issue a strike.

# Travel

## What if I need a hotel for my assignment?

* TBC must receive approval from clients for all travel for each individual meeting. If we have received approval prior to sending out the meeting notice, we will include that fact in the request form. If that has not been notated in the meeting request, when you respond that you are available please include that what type of travel will be necessary. We will then notify you once we receive approval.

## Who makes travel reservations?

* TBC will make and prepay for all airfare and hotel rooms. We can prepay for rental cars when reserved with Enterprise or National. If you will be requiring travel for a meeting, when responding include any requirements you may have. Examples include which airport you would like to depart from, time restrictions or preferred hotel chains.

## How do I find out my itinerary?

* TBC uses the travel website Egencia. Your reservation details will be emailed directly from the email address [corptravel@customercare.egencia.com](mailto:corptravel@customercare.egencia.com)

## What if I am unhappy with the arrangements, can I make changes?

* No, you cannot change the itinerary directly. Email TBC and we will try and do everything to accommodate your request.

## How do I cancel a hotel?

* You cannot cancel a hotel. You must contact TBC directly for us to cancel the hotel in the Egencia system.
* If you call the hotel directly to cancel, TBC will still be charged.

## How does TBC choose a hotel?

* TBC looks at a number of factors including proximity to site, user reviews and price. While our clients do impose cost limitations on the hotels, your safety and convenience are of primary importance.

## What if I want to fly with a particular airline or stay with one chain of hotels?

* If you have preferences, let us know when you accept the meeting. We will certainly make every effort to accommodate your wishes. However, if your preference is priced higher than other reasonable accommodations or flights, we will book the cheaper alternative.

## What do I do if the hotel is not prepaid?

* Rarely when you arrive at the hotel to check in, it may not have been prepaid. If this happens, email us or call us when you arrive. If it is after business hours, we will respond first thing in the morning. Please use a personal credit card to hold the room and before you check out the next morning we will contact the front desk with our card information or reimburse you with your expense report.

## Is there a number to call for travel emergencies?

* Yes, Egencia provides a number for you to use if you have problems. However, TBC is charged a very large fee every time a benefit educator calls. Use this number only as a last resort in extreme emergencies.
* 866-397-2677

## How do I incorporate my rewards numbers?

* Email us and we will enter your information into your travel profile on Egencia.

## When can we request a rental car?

* TBC requires educators to use a rental car when the mileage to a meeting from your home address is over 150 miles or 300 miles roundtrip.
* Or, if you are experiencing car troubles and are unable to attend your assignment we can rent you a car on a limited basis.

## Will TBC prepay for our rental cars?

* Rental cars can be prepaid by TBC if reserved with Enterprise or National.
* If Enterprise is not an option for TBC to book through Egencia, we will let you know that we cannot prepay and we will reimburse you.

## Should I opt for the additional car insurance?

* No, you are covered under our group policy

## Should I fill the car up before returning it to the agency?

* Yes, and we will reimburse you for the gas expenses. This is typically significantly cheaper than having the car rental agency fill the gas tank themselves.

# Equipment

## Do I bring my UHC tablecloth and display to every event?

* Yes, unless specifically instructed otherwise by the UHC Account Team.

## What if my meeting request form states to bring a laptop and/or projector?

* All group health benefit educators are required to have their own laptops and/or a tablet that can be utilized in lieu of a laptop. If you are utilizing a tablet you must be sure to have the appropriate cords to connect your tablet to an employer’s projector or TV.
* All retirement plan educators are required to have a laptop/tablet *and* a projector (plus appropriate connective cords). A presentation remote is recommended. When a personal projector is utilized for meetings with Lincoln Financial Group, BB&T or BlueStar in any given month, the consultant will receive a stipend of $150 for that month. Preferably projectors should be at least 3000 lumens.
* Equipment will only be rented by Total Benefit Communications if pre-approved. If you have any questions about equipment, prior to your meeting, please reach out to the Meeting Coordinator for clarification.

## What is the myuhc.com demo listed under equipment on the UHC Event Details?

* The myuhc.com demo can be found at <http://www.welcometomyuhc.com/resources/>
* Storytellers can be found on the UHC Enrollment Training site under marketing materials. <http://www.uhcnational.com/enrollmentresource/storytellers.html>

## If I have wireless access, how should I use my laptop?

* As always, defer to client expectations at the event. You can show people how to log in and visit the client’s pre-member website, show presentations or other valuable websites.

## What should I do in case I do not have wireless access?

* For UHC, before attending the meeting, download the myuhc.com demos and/or the UHC Storytellers to attract employees to your table.
* The myuhc.com demo can be found at <http://www.welcometomyuhc.com/resources/>
* Storytellers can be found on the UHC Enrollment Training site under marketing materials.

<http://www.uhcnational.com/enrollmentresource/storytellers.html>

* For other clients, please check with your contact for options.

## What if the UHC Event Details list myuhc.com specifically?

* In that case, you will definitely be expected to run the demos and/or walk members through the website and should prepare accordingly.
* Remember to let TBC know if you do not have a laptop and myuhc.com is listed on the event details. If you do not have a personal laptop or tablet, the meeting may need to be reassigned.

## Should I bring a projector to the event?

* UHC does not pay for projector rentals except in very limited cases. If you are scheduled for a presentation and the site is insisting you bring a projector, please email us and we will try and obtain approval.
* If you have a personal projector and are comfortable bringing it to the event, please feel free.
* For retirement plan events, the confirmation email from TBC will identify if you need to bring a projector to the event.

## Is there any reimbursement for using my own equipment?

* Not for UHC meetings or personal laptops.
* If you are doing a meeting for Lincoln Financial Group, BB&T or BlueStar and a client requires a projector, there is a $150 reimbursement per month for using your own equipment.

# Contacting TBC

## How do I contact TBC?

* Main Number: 678-579-9600
* Fax: 678-579-9595

## What are the staff’s extensions?

* Ivy Fenton x58343
* Jessica Hern x58342
* Brad Teach x62501
* Magdalina Belot x58348
* Gabriella Fervienza x58344
* Holly Wallis x58345
* Lauren Schoch x58353
* Susan Bui x58347
* Angie Risler x51786
* Jill Herkenhoff x55340

## Who should I contact with Specific Questions?

* Below is escalation paths to contact TBC. Your first email should include the first option listed in the category along with the person who assigned you the meeting. If the matter is urgent, please CC as many people in the escalation path to get the matter resolved.
* For meeting questions in this order:
  1. meeting@benefitprojects.com and the person who sent you the meeting
  2. Client Specific Consultant Coordinator/Administrative Assistant
  3. Client Specific Relationship Team Member
* For expense report questions in this order:
  1. tbc@benefitprojects.com and the person who assigned you the meeting
  2. Client Specific Consultant Coordinator/Administrative Assistant
  3. Ivy@benefitprojects.com
  4. Client Specific Relationship Team Member
* For travel questions in this order:
  1. travel@benefitprojects.com and the person who assigned you the meeting
  2. Client Specific Consultant Coordinator/Administrative Assistant
  3. Client Specific Relationship Team Member
  4. [Ivy@benefitprojects.com](mailto:Ivy@benefitprojects.com)
* For consultant information (availability, address changes, etc) in this order:
  1. [TBC@benefitprojects.com](mailto:TBC@benefitprojects.com)
  2. Consultant Coordinator/Administrative Assistant
  3. [Ivy@benefitprojects.com](mailto:Ivy@benefitprojects.com)
* If you are unsure who to contact in the escalation path, it is based upon which TBC employee works with each client. The on the next page will help you:

## How do I get in touch via email?

* firstname@benefitprojects.com
* Questions about specific meetings – email [meeting@benefitprojects.com](mailto:meeting@benefitprojects.com)
* General questions, expense reports or updates – email [tbc@benefitprojects.com](mailto:tbc@benefitprojects.com)
* Travel questions or concerns – email [meeting@benefitprojects.com](mailto:)

## What is the best way to reach someone?

* The best way to contact someone is to email one of the general boxes at Meeting or TBC. These are monitored by all employees and ensure you are helped quickly and efficiently.
* Calling can be ineffective, especially during busy season. Your question will not be addressed in a timely manner.

## What if I have questions after business hours?

* If you have an issue that must be addressed immediately, please email [meeting@benefitprojects.com](mailto:meeting@benefitprojects.com) directly first. TBC employees are often at the office fairly late – especially during Open Enrollment, and may be able to quickly help you.
* If no one responds and your issue cannot be addressed in the morning, call the main number, 678-579-9600, and press 8. Calls are forwarded to the on call person and will be returned promptly.
* If the matter is not extremely urgent, email us and we will be in touch first thing in the morning.

## What if I have questions about payment?

* For all payment questions, please contact Holly – [tbc@benefitprojects.com](mailto:tbc@benefitprojects.com)
* Do not contact Ascensus (or ARS ESC as seen on your deposit notification) for payment questions or concerns. They cannot answer any questions.

## How can I change my personal information?

* Email [tbc@benefitprojects.com](mailto:tbc@benefitprojects.com) with changes to your banking, address or contact information.

## What is TBC’s address?

* 1117 Perimeter Center West, Suite N102, Atlanta, GA 30338