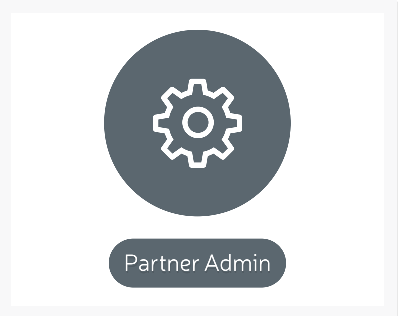
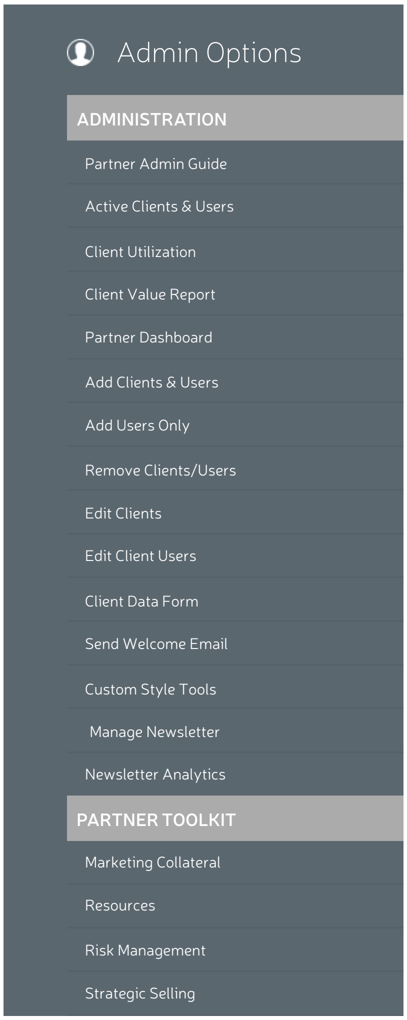
THINKHR WORKPLACE
PARTNER ADMINISTRATION GUIDE

The Partner Administration feature in the ThinkHR Workplace allows you to view client activity, add and remove clients and users, resend welcome emails, and more. Log in to ThinkHR Workplace, click the Partner Admin button and then click one of the options below in the Admin Options area.



User Types

- M Master—has access to all functions
- C Clients—companies or groups you've registered
- U User—employee who has access to Learn



Master Users Menu:

- Active Clients and Users
- Client Utilization
- Client Value Report
- Partner Dashboard
- Add Clients and Users
- Remove/Edit Clients and Users
- Client Data Form
- Send Welcome Emails
- Manage Newsletters
- Newsletter Analytics
- Partner Toolkit
  - Marketing Collateral
  - Resources
  - Risk Management
  - Strategic Selling

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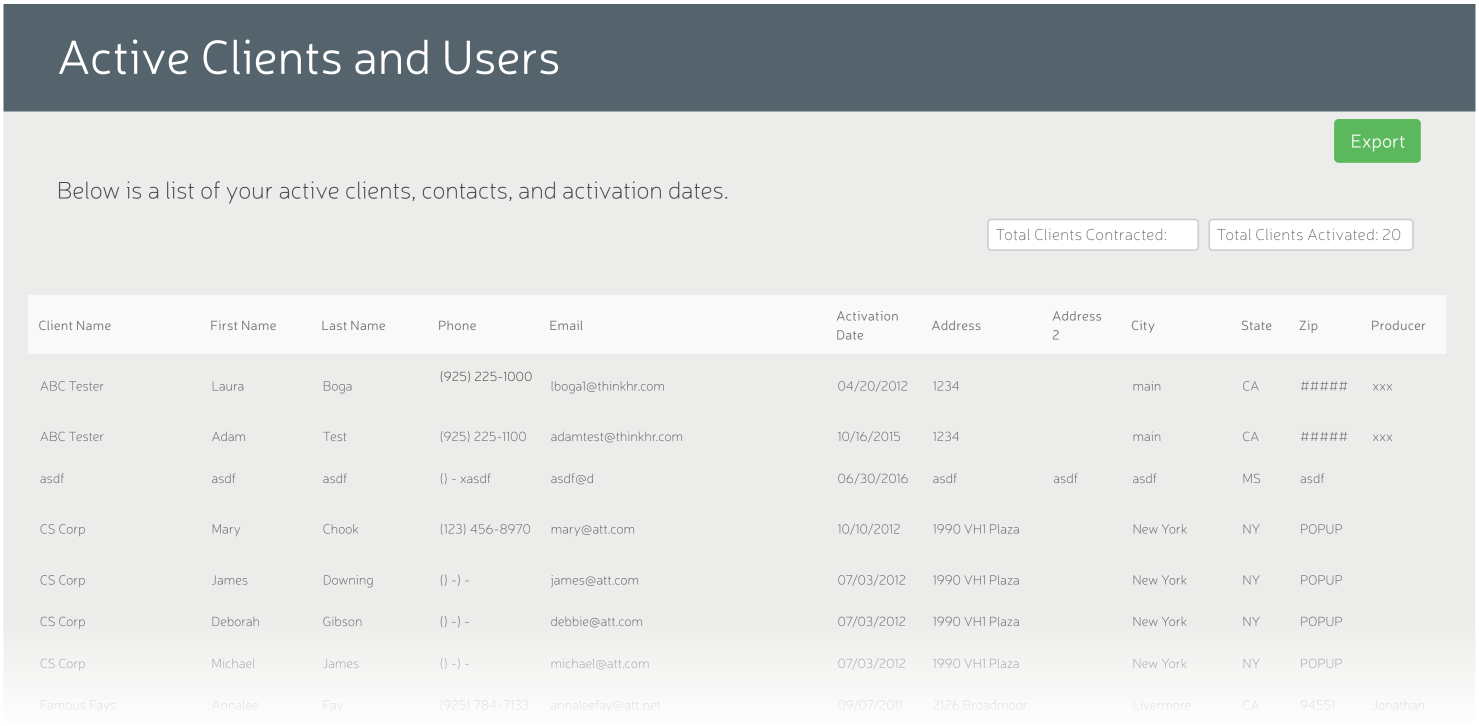
ADMINISTRATION MENU

Active Clients & Users

This report allows you to view all of your registered clients and users and confirm that a client and their appropriate users are registered. You can also view producer information for each account. This report can be exported to Excel.



Active Clients and Users

Export

Below is a list of your active clients, contacts, and activation dates.

Total Clients Contracted:

Total Clients Activated: 20

Client Name	First Name	Last Name	Phone	Email	Activation Date	Address	Address 2	City	State	Zip	Producer
ABC Tester	Laura	Boga	(925) 225-1000	lboga1@thinkhr.com	04/20/2012	1234		main	CA	#####	xxx
ABC Tester	Adam	Test	(925) 225-1100	adamtest@thinkhr.com	10/16/2015	1234		main	CA	#####	xxx
asdf	asdf	asdf	() - xasdf	asdf@d	06/30/2016	asdf	asdf	asdf	MS	asdf	
CS Corp	Mary	Chook	(123) 456-8970	mary@att.com	10/10/2012	1990 VH1 Plaza		New York	NY	POPUP	
CS Corp	James	Downing	() -) -	james@att.com	07/03/2012	1990 VH1 Plaza		New York	NY	POPUP	
CS Corp	Deborah	Gibson	() -) -	debbie@att.com	07/03/2012	1990 VH1 Plaza		New York	NY	POPUP	
CS Corp	Michael	James	() -) -	michael@att.com	07/03/2012	1990 VH1 Plaza		New York	NY	POPUP	
Famous Fays	Annalee	Fay	(925) 784-7133	annaleefay@att.net	09/07/2011	2126 Broadmoor		Livermore	CA	94551	Jonathan

Client Utilization

This report allows you to get a real time view of how your clients are using ThinkHR. You can see how often your clients are submitting issues or questions to the ThinkHR Live team, which categories those issues fall into, and the amount of traffic to the ThinkHR Workplace since activation. You can export this report to Excel.

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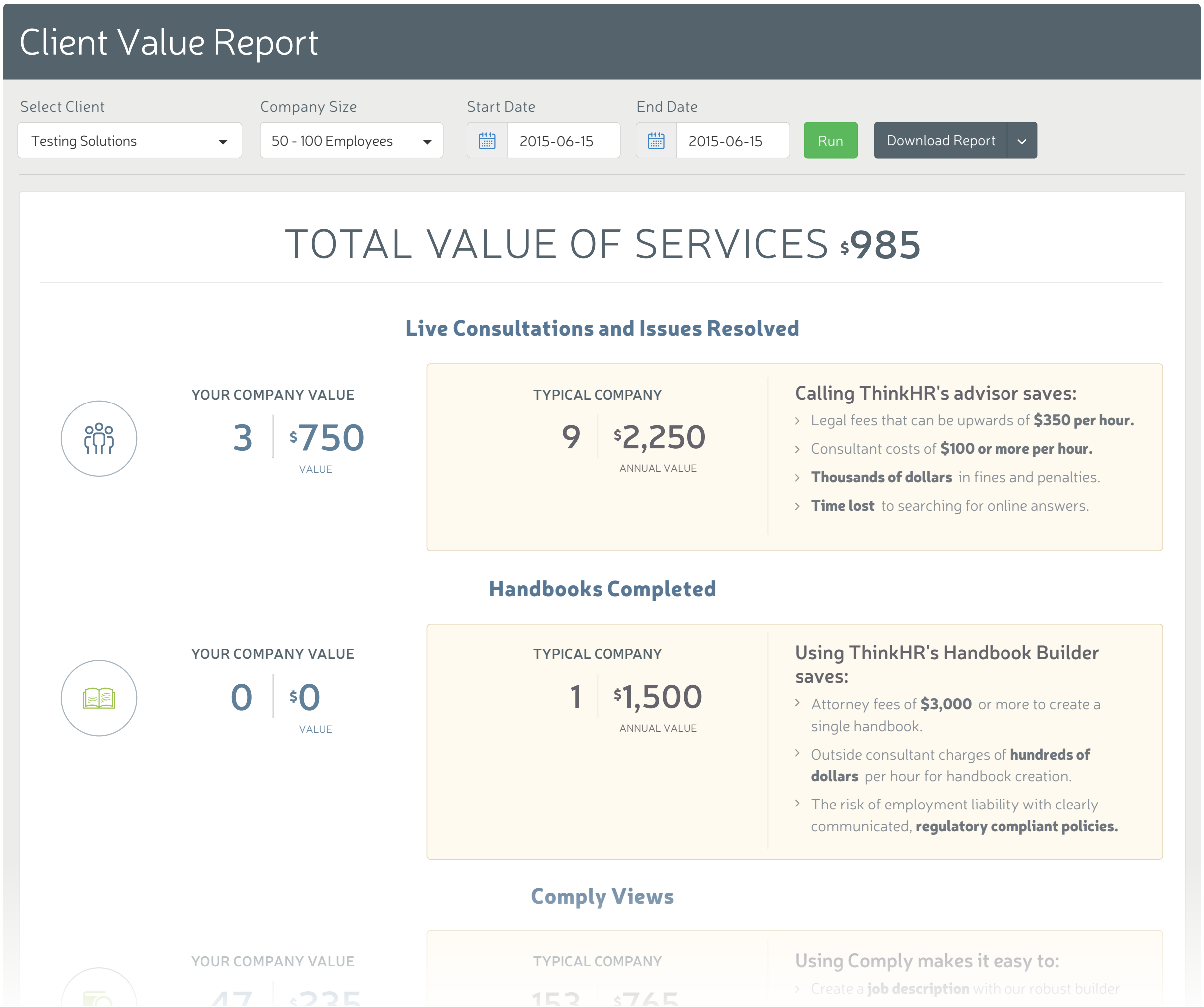
Client Value Report

This report allows you to see the value that your individual clients are getting from their ThinkHR solutions. The report also compares their usage to typical usage of companies of similar size and provides talking points you can use in client and prospect meetings. You can view, per client:

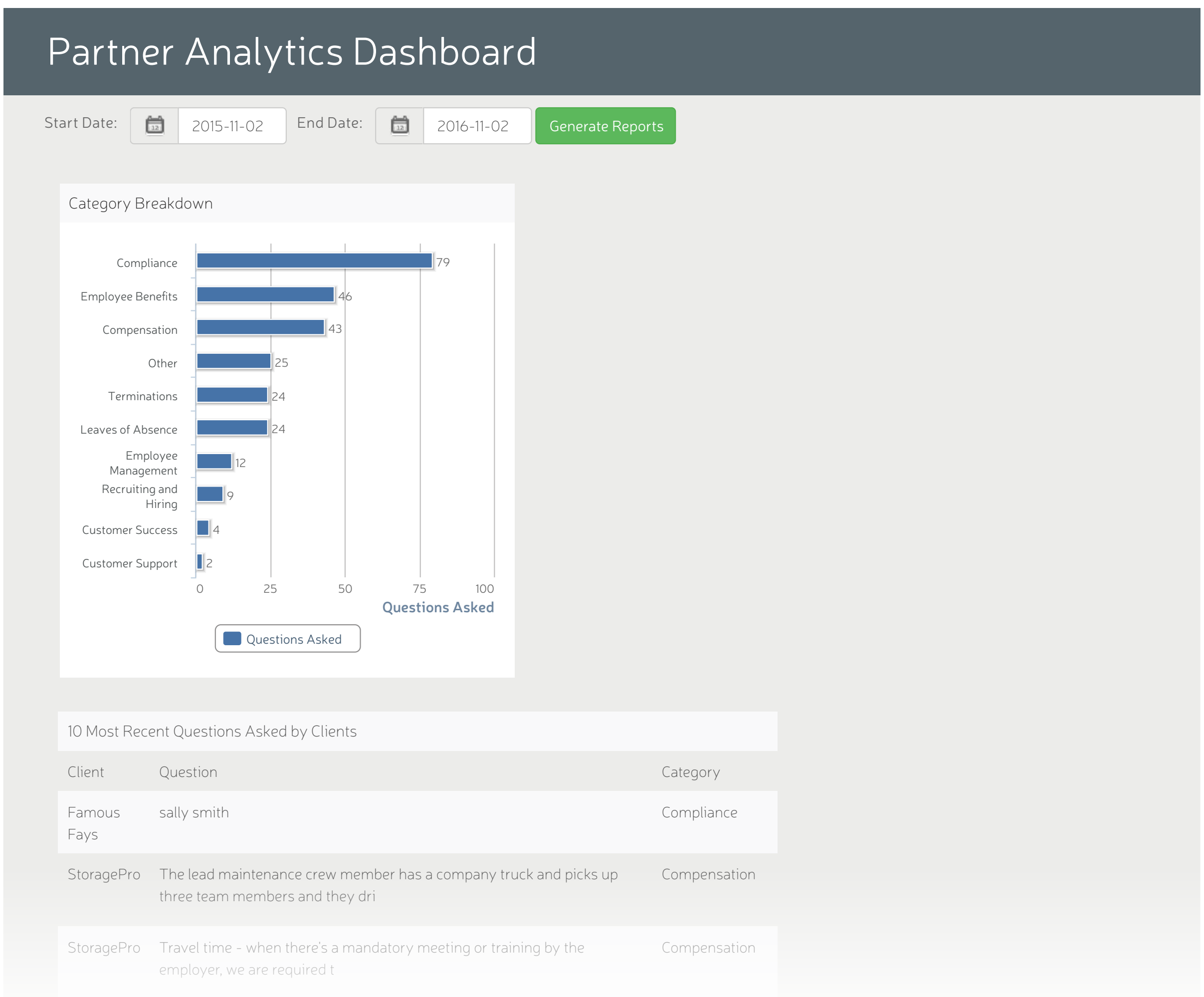
- consultations with the team of HR advisors
- employee handbooks built
- Comply page views
- completed training courses



Partner Dashboard

This full analytics dashboard report allows you to select a date range and view:

- the categories of questions your clients are asking the ThinkHR Live team
- the ten most recently asked questions by clients
- total clicks into ThinkHR Comply
- your top five clients using ThinkHR Live
- total registered clients
- clients contracted
- client logins
- broker logins
- questions asked by brokers
- questions asked by clients



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Add Clients & Users (master users only)

Select the number of clients you would like to add from the drop down menu, enter the appropriate information, and we will send the added user(s) a link to set up their password(s). To give your clients access to the HR Hotline live advisors, ThinkHR Learn employee training courses and newsletters, simply check the appropriate box. Once you click "submit," the client automatically receives a welcome email from welcome@myhrworkplace.com. You can always confirm the addition by clicking "Active Clients & Users" in the Administration section.

Remember, duplicate client names and email addresses are not allowed. We recommend that you check Active Clients & Users first to be sure the client is not already registered. If a user does not receive the welcome email, it may be caught in spam or junk mail folders. Please have the client check those folders and approve the sending domain "thinkhr.com" in their security settings.

You can also give prospects access to Workplace to show them what they would get if they were a client of yours. If you do use this tool for prospects, be sure to delete them once their "trial period" is over.

Remove Clients & Users (master users only)

Use this feature when you have to remove one user, multiple users, or even an entire company account from ThinkHR.

Editing Clients & Users (master users only)

- Edit Clients–Select the company from the menu, make your changes and click "submit."
- Edit Client Users–Select the company from the menu and then select the user you wish to edit, make your changes and click "Submit."

If you change an email address or password, a welcome email will automatically be sent to the user with his/her updated login information.

Resend Welcome/Login Email (administrators only)

Use this tool to provide login information to a client who lost or deleted the original email. You can also send several emails in one batch to clients who have not had much activity based on the Client Value Report.

After you click submit, a welcome email will go out from welcome@myhrworkplace.com. Be sure to inform your client so that they can keep an eye out for it in their inbox.

> Dear Adam,
>
> Congratulations! You now have access to ThinkHR Workplace Pro, a cloud-based platform of integrated HR resources designed to make your work more elficient--and your life a little easier, brought to you by ThinkHR.
>
> Log in now to explore the highest quality, most trusted information you can rely on to keep your HR practices compliant and help your business thrive.
>
> Login:
>
> Username: adamtest@thinkhr.com
>
> Click on the link below to create your password:
>
> Create your password: [LINK]
>
> This link will expire at November 10, 2016 11 :25am PST.
>
> ThinkHR Workplace Pro includes:
>
> - **ThinkHR Live:** A team of HR experts standing by to answer your questions or provide advice.
>   - Call us at **877-225-1101**; we're open 11 hours every business day from **8am to 7pm Central.**
> - **ThinkHR Comply:** An award-winning resource cen ter for all of your workforce and compliance issues
>   - Explore key tools like our **Q&A Database, HR Audit Checklist** and hundreds of downloadable **sample notices, forms, policies and checklists.**
>   - Stay current on events and dates you need to know with the **Compliance Calendar. Ease the burden of compliance** with the state-level **Employee Handbook Builder** with pre-loaded content, step-by-step instructions, expert commentary and online support.
> - **ThinkHR Learn Pro:** Training solutions that develop and empower employees as well as ensure compliance with reporting and administrative components.
> - **ThinkHR Mobile App:** Ask a question and review our HR resource database **whenever and wherever you** need it.

Client Data Form (master users only)

Download and complete the form and send it to customersuccess@thinkhr.com. A customer success representatives will alert you when your client list has been successfully uploaded.

CUSTOM BRANDING MENU

The following three menu options are for partners with Custom Branding.

Custom Style Tools (master users only)

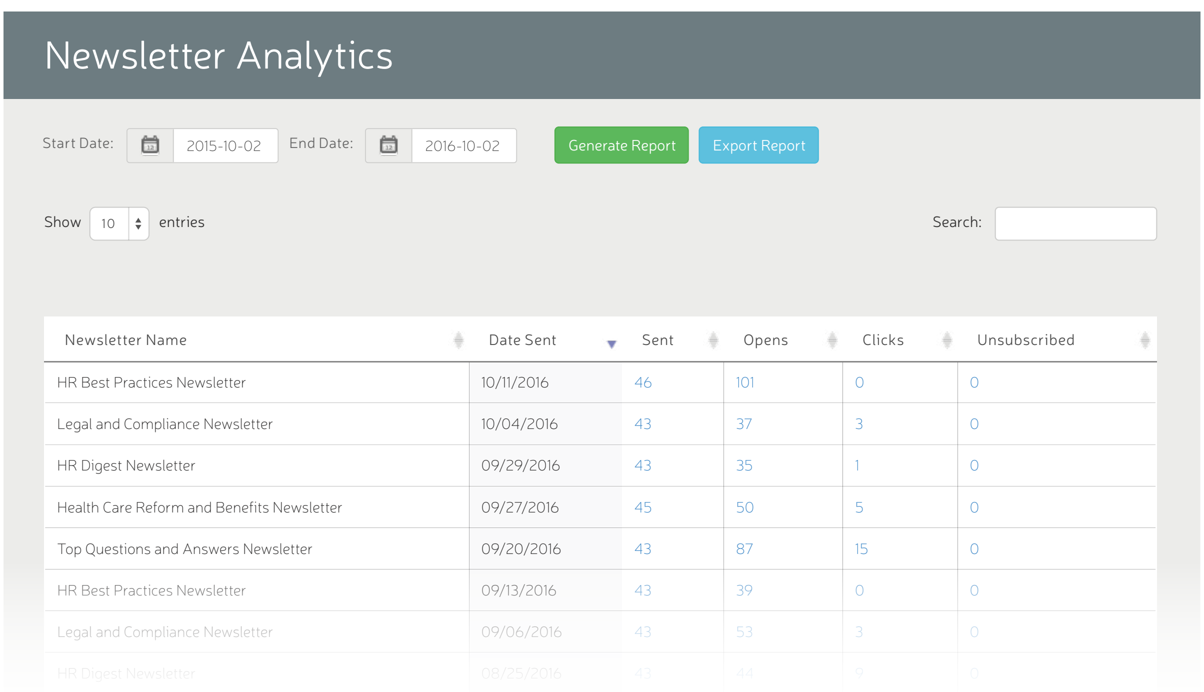
Use this editor to customize your workplace landing page to match your company colors. Workplace and Comply will be set up by your Customer Success Manager during implementation.

Manage Newsletter (master users only)

Here you can manage the agency-branded newsletters you send to specific users. You can also see which users have opted out of your branded newsletters.

Newsletter Analytics (master users only)

Here you'll find a high-level report of the weekly agency-branded newsletters that includes how many were sent, opened, clicked, and the number of unsubscribes. You can also click any of the numbers and get client-level detail.



Newsletter Name	Date Sent	Sent	Opens	Clicks	Unsubscribed
HR Best Practices Newsletter	10/11/2016	46	101	0	0
Legal and Compliance Newsletter	10/04/2016	43	37	3	0
HR Digest Newsletter	09/29/2016	43	35	1	0
Health Care Reform and Benefits Newsletter	09/27/2016	45	50	5	0
Top Questions and Answers Newsletter	09/20/2016	43	87	15	0
HR Best Practices Newsletter	09/13/2016	43	39	0	0
Legal and Compliance Newsletter	09/06/2016	43	53	3	0
HR Digest Newsletter	08/25/2016	43	44	9	0

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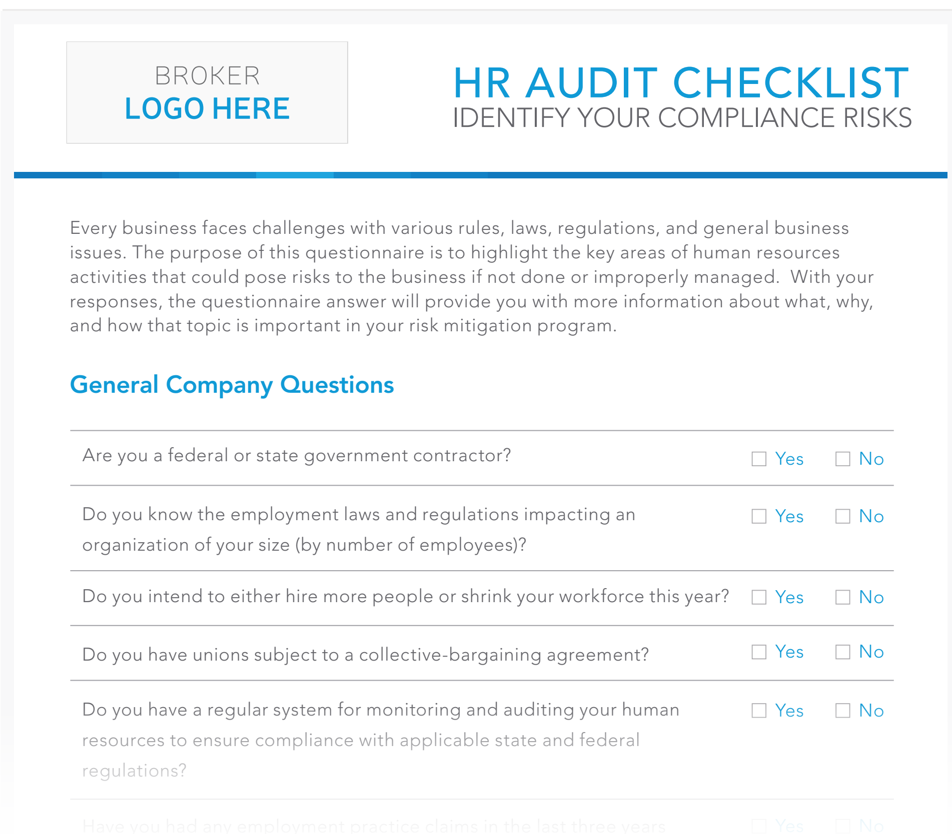
PARTNER TOOLKIT MENU

We arm partners with a variety of collateral to help educate clients and prospects about the comprehensive HR support you are providing. We encourage you to take these materials with you to every prospect meeting. It is equally as important to leverage these materials across your existing client base. You might consider including some or all of these materials in your renewal presentations, mid-year meetings, and stewardship reports. All collateral is co-branded with your agency's logo.

Highlights of the Marketing Collateral Section include:

- Co-branded brochures for clients or prospects to give them an overview of ThinkHR services
- Training course list
- Link to a three-minute ThinkHR overview video
- Sample HR questions
- Quick HR audit
- Overview presentation
- Past editions of the Strategic Broker newsletter



BROKER
LOGO HERE

HR AUDIT CHECKLIST
IDENTIFY YOUR COMPLIANCE RISKS

Every business faces challenges with various rules, laws, regulations, and general business issues. The purpose of this questionnaire is to highlight the key areas of human resources activities that could pose risks to the business if not done or improperly managed. With your responses, the questionnaire answer will provide you with more information about what, why, and how that topic is important in your risk mitigation program.

General Company Questions

Are you a federal or state government contractor?	☐ Yes	☐ No
Do you know the employment laws and regulations impacting an organization of your size (by number of employees)?	☐ Yes	☐ No
Do you intend to either hire more people or shrink your workforce this year?	☐ Yes	☐ No
Do you have unions subject to a collective-bargaining agreement?	☐ Yes	☐ No
Do you have a regular system for monitoring and auditing your human resources to ensure compliance with applicable state and federal regulations?	☐ Yes	☐ No
Have you had any employment practice claims in the last three years	☐ Yes	☐ No

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Resources

The resources in this section are designed as comprehensive reference documents that are ideal leave-behinds with prospects or clients. Some examples include a federal HR compliance chart, small and large employer ACA checklists, and federal recordkeeping information.

Risk Management

This section contains items that will assist your clients with risk management and workers' compensation issues. Some items included are: Employment Practice Risks, Workers' Compensation Checklist, Injury Management Risk Sheet, and many others.

Strategic Selling

This section is filled with documents that help communicate with your clients and prospects and identify areas of HR pain, from costs to challenges they face. Some materials include an HR Practice Calculator, 36 HR Challenges, and a video on how to position ThinkHR.

The Partner Sales Kit was created to help our partners talk about the value of the HR solutions they are giving to their clients and prospects. The kit includes:

- Email templates
- HR Scorecard
- Questions to ask clients and prospects
- PowerPoint presentations
- How to talk to your groups about ThinkHR

If you have any questions regarding the **Partner Administration** section and its functions, please contact ThinkHR at 877.225.1101 option 2. One of our support representatives will be happy to assist you.

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