



LifeWorks
by Morneau Shepell

LifeWorks Platform

Administrator Guide



Your Administration Guide

Congratulations!

Your organisation has access to the LifeWorks platform as part of your health coverage, a uniquely integrated online well-being solution.

This step-by-step guide provides an overview of the platform, as well as information about your role as an administrator and how to manage associated functions.

Section 1: Intro to the LifeWorks platform

- 1.1: Your role as an Administrator
- 1.2: Accessing the platform
- 1.3: Overview of "Profile"

Section 2: Platform Overview

- 2.1: Work/Community: News Feed, Colleague Directory, Recognition
- 2.2: Life: Your Employee Assistance Program (EAP) and well-being resources
- 2.3: Personalised Well-being Content: Snackable Well-being
- 2.4: Perks: Exclusive employee savings, deals & discounts

Section 3: Intro to Administrator Role & Admin Panel Management

- 3.1: Your Admin Dashboard
- 3.2: Timeline/News Feed
- 3.3: Recognition
- 3.4: Perks

After reviewing the guide, if you have questions, you can:

- Visit our [Help Centre](#) for more details
- Contact your Service Representative

Section 1 – Intro to LifeWorks

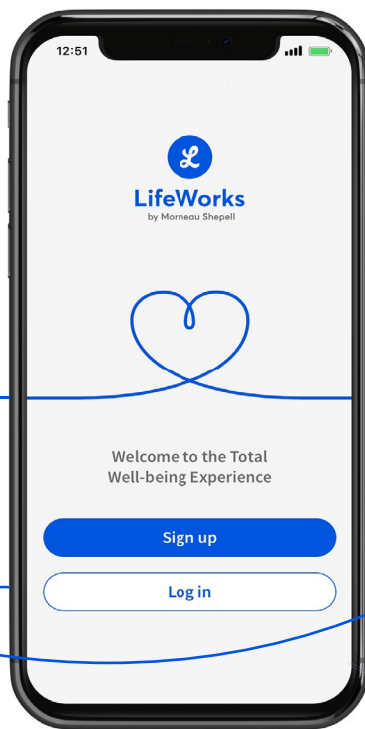
LifeWorks is a uniquely integrated and innovative **well-being platform** available by browser and mobile app.

1.1: Your role as an Administrator

- Take advantage of the solution to support your own well-being
- Foster a culture of prevention that contributes to the development of a healthier workplace



1.2: How to get started on LifeWorks



Getting started:

How you will register depends on the method your organisation has selected.

We support Safari, Firefox, Chrome and Internet Explorer 11 and above. Please visit help.lifeworks.com for a full list of supported browser versions.

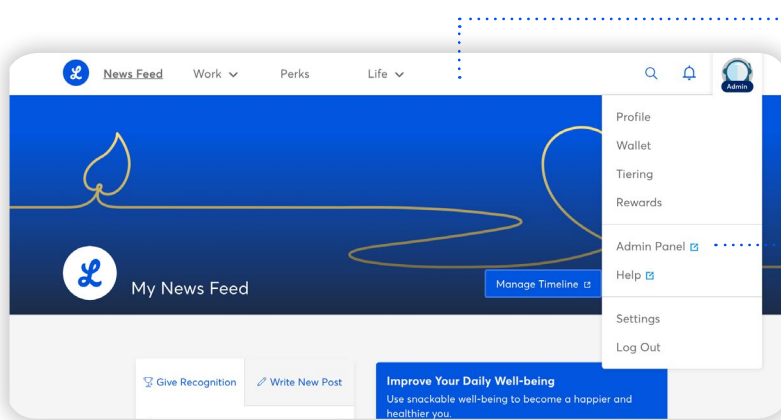
Please check company policies before downloading or updating any software on work devices.

1.3: Overview of "Profile" on the platform

Below is an overview of the experience on the platform. If you are both an administrator and employee, you will enjoy the same experience, as well as your added access rights.

When logging in to the platform, you will land on the News Feed – the platform’s main hub for organisational communications and the celebration of workplace achievements!

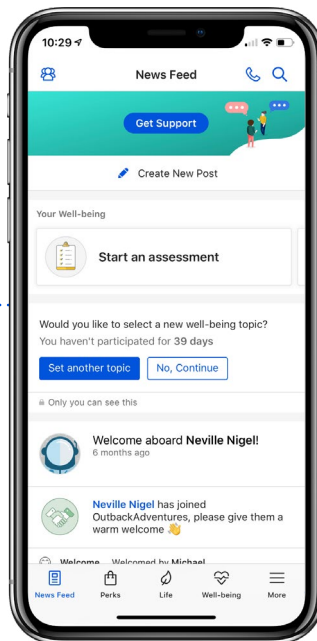
Accessing by Web app:



- **The top navigation menu** includes News Feed, Work, Perks, and Life, a Search field, a Notifications icon (represented by a bell), as well as a "Profile" button in the top right-hand of the screen.
- **As an Administrator**, if you're also an employee and you have access to the platform, your button will be denoted "Admin", while employee's will see a Profile button without Admin beneath it.

By mobile app:

When accessing by mobile app, you will see the **News Feed** posts in the main frame of the phone's screen.



- **The main navigation items** (Perks, Life, Work, and More -- which includes Profile) appear in a button format along the bottom of the screen.

1.3.1: Profile

Below, we provide a high-level introduction to the menu under the “Profile” button (Web app) or “More” menu (mobile app): Profile, Wallet, Admin Panel, Help, and Settings.

Under “Profile” employees can:

- Add a photo to help colleagues locate them/put a face to the name
- Fill out information such as job title and something personal they’d like to share in the “About You” section
- Edit profile details any time, then click “Save”
- View a timeline of Recognitions

1.3.2: Wallet

The Wallet is a personal electronic wallet, into which we credit the tracked cashback the employee has earned from Online Shopping on the platform through our exclusive links. We will review Perks (which includes Online Shopping, cash-back tracking, etc) in Section 2.

1.3.3: Admin Panel

If you are both a Plan Administrator and an employee, you can access the Admin Panel -- your organisation’s dashboard and administrator tools -- directly through this menu. If you are not an employee, when your account is created, we will send you an email with a link to set up your Admin Panel access with a password. You will then access the Admin Panel at admin.lifeworks.com.









1.3.4: Help

Our Help platform (help.lifeworks.com) contains links to Frequently Asked Questions (in English & French) about all sections of the platform, including the Admin Panel.

If you don't see the question and answer you need, click on "Submit a Request" and fill out our form. A technical representative will reply to your request by email.

Questions you may have

- [How do I sign up for LifeWorks?](#)
- [How Can I Access LifeWorks?](#)
- [How do I verify my account?](#)
- [How can I change my password?](#)
- [What Is My LifeWorks Wallet?](#)
- [What Is Shop Online?](#)
- [How can I connect with the program?](#)

 Getting Started	 Your Account	 News Feed	 Wellness
 Work	 Perks	 Life	 Rewards

1.3.5: Settings

Under Settings (which is personal and available to all employees), you will find:

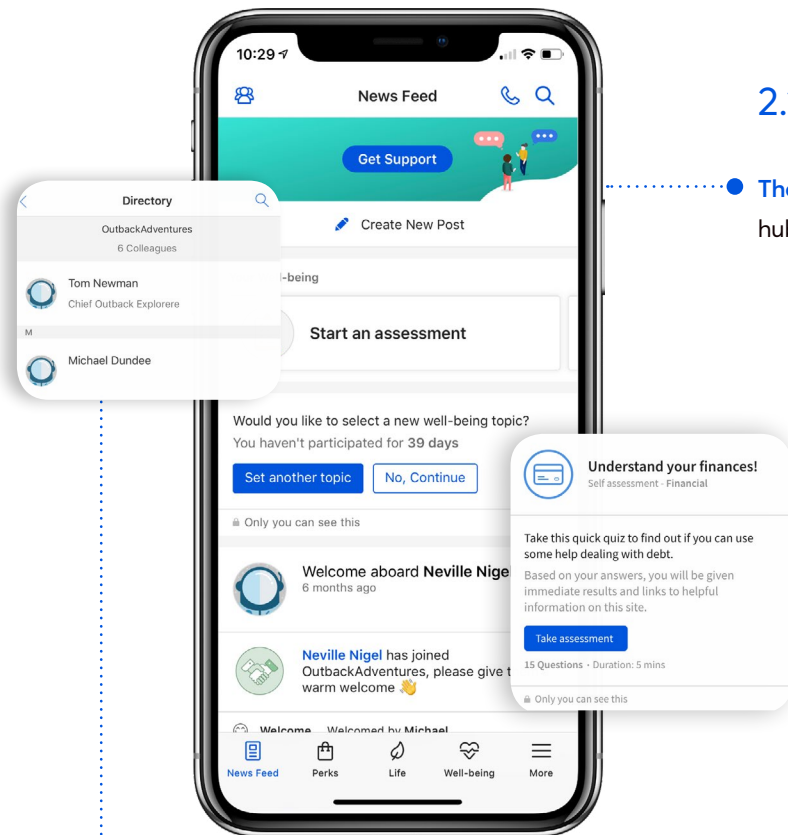
- Account Settings (change your language, change your password)
- Snackable Well-being (change your topic)
- Email Notifications (change your email notification preferences for cashback, Recognition, or Posts and Comments)
- Useful Links (Contact LifeWorks, Privacy Policy)

1.3.6: Log out

This one is simple: Log out of the platform here! When using shared devices specifically, we recommend that employees close out of their browser after performing any online activity they deem personal or confidential. Employees should also consider clearing their browser's history regularly.

Section 2 - Platform Overview

2.1: Community/Work



2.1.1: News Feed

• **The News Feed** is the central communication hub for the platform, enabling employees to:

- Read Company Posts
- Receive deliveries of Snackable Well-being content
- Read Recognitions, re-recognise, and like and comment on those posts

2.1.2: Colleague Directory

- **The Colleague Directory**, accessible under "Work," is an organisation's list of employees registered on the platform, and a great way to get to know one another. Employees can search alphabetically for colleagues on the network and view contact information by clicking on the individual's listing.

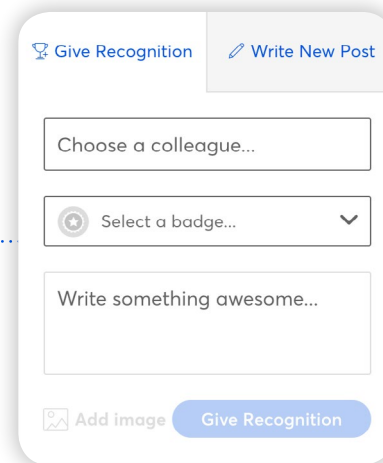
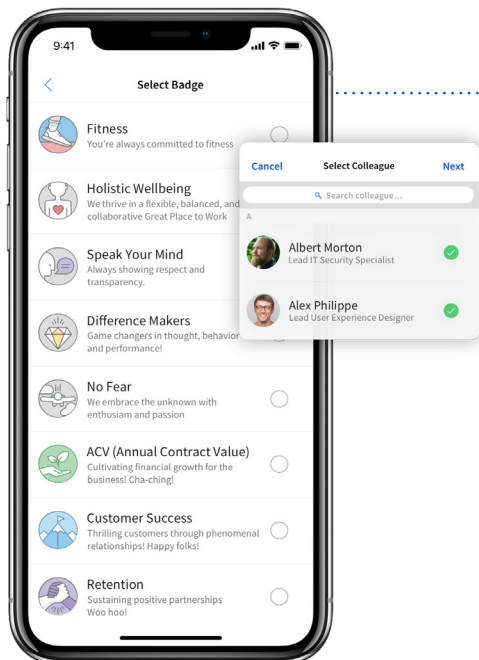
2.1.3: Recognition

Formal recognition tools help foster a culture of appreciation and collaboration. The platform's Recognition tools make celebrating great work and acknowledging contributions to organisational success simple, while rewarding positive attitudes and reinforcing important workplace values.

2.1.3.1: How to Recognise

Recognitions display in the News Feed to all the organisation's employees registered on the network.

To recognise by Web app: Employees navigate to the News Feed tab, select "Give Recognition," then "Choose a colleague" from the Colleague Directory by typing their name or names into the field (employees can recognise multiple individuals in the same post). They then select a values badge from the drop-down menu, and add a special typed message before clicking "Give Recognition."

To recognise by mobile app: In the News Feed, "Give Recognition" appears right at the top of the screen. employees tap it to select a colleague or colleagues to recognise, click "Next", then "Select a badge" from the values badge drop-down, write a message, and click "Post".

2.1.3.2: How to Re-recognise or Comment on a Recognition

Our platform works just like so many of the social media applications your employees already use and love, but this is an organisation's very own private network!



If an employee sees a meaningful Recognition which he/she wishes to "second," the "Re-recognise" trophy and "Comment" icons are located directly below each Recognition post. These are easy to use, helping to spread news about exciting initiatives throughout the organisation, reinforcing teamwork, and strengthening workplace spirit.

2.1.3.3: Values badges

Our platform works just like so many of the social media applications your employees already use and love, but this is an organisation's very own private network! You can select the badges from the Admin Panel, under the Performance drop-down. We recommend selecting 6-10 badges.



Teamwork

You work well with everyone and always deliver outstanding results.
Great teamwork!



Superstar

You always go that extra mile and produce brilliance.
Keep it up!



Organised

You're always on top of everything and deliver on time. Keep it up!



Efficient

You're always committed to getting the job done.
Good work!



Leadership

You inspire those around you and always get the best out of those you work with.
Keep on leading!



Great Ideas

You inspire everyone around you to deliver excellence.
Keep inspiring!



Helpful

You're always there to lend a helping hand. You deserve a thank-you!



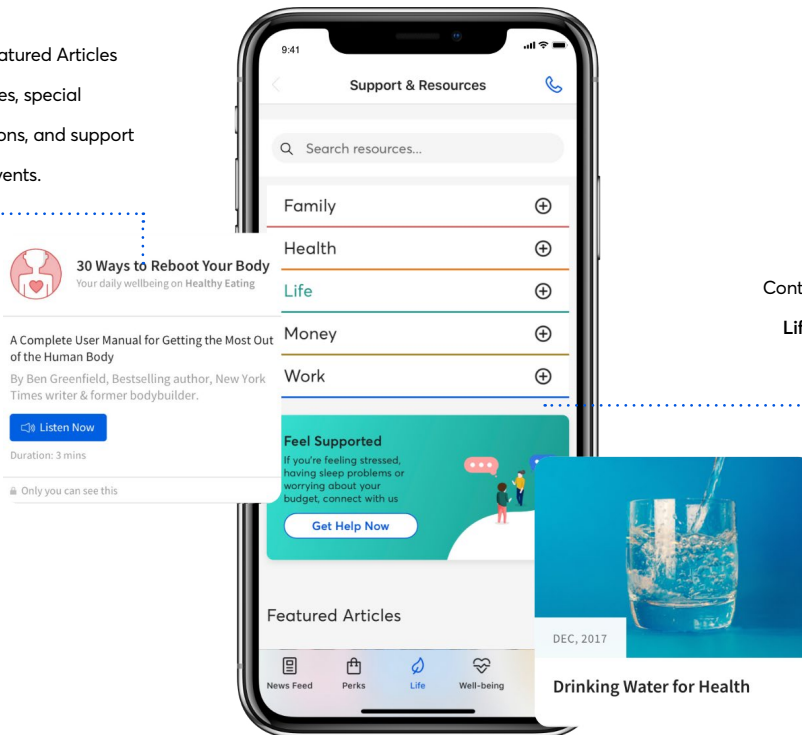
Generic

You've done something awesome, keep up the good work!

2.2: LIFE – Your Employee Assistance Program (EAP and well-being content)

As an Employee Assistance Program customer, your organisation’s employees have access to a confidential EAP, as well as to a wealth of well-being content written and reviewed by recognised industry experts and best-selling authors.

Newly-updated and Featured Articles include changing themes, special health-related promotions, and support in response to global events.



Content is divided into **Family, Health, Life, Money, and Work**, and is easily searchable by topic or issue.

Content can be found under the main navigation’s “Life” drop-down when accessing by Web app, and under the “Life” button on the mobile app, then under “Employee Assistance”. Content includes:

- Service descriptions
- Hundreds of articles
- eBooks
- Online Toolkits
- Online Calculators
- Financial Health Assessment to assess sense of financial well-being
- Podcasts, CD-length recordings
- Quick Links
- And so much more!

EAP services include:

- **24/7 toll-free access to professional advisors** for advice, support, resources, research requests, and referrals
- **24/7 access to counselling** for immediate, short-term support
- Referrals to **in-person counselling**, as well as counselling options by phone, live by Webcam over the Internet, and in virtual groups for specific issues such as anxiety, stress, and caregiver stress
- **Referrals** to legal and financial specialists, dietitians, naturopathic services
- **Connections to community agencies** and organisations for local support with specific needs and issues
- **Research results about service providers** such as child care/ day camp facilities, elder care supports, etc.

2.3: Personalised Well-being Content

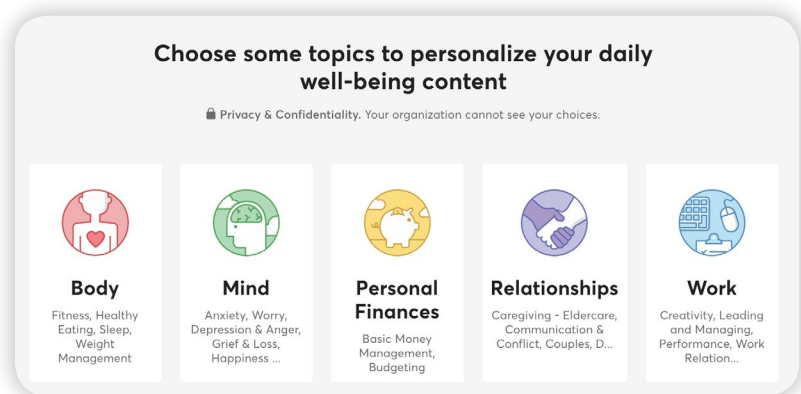
2.3.1: Snackable Well-being

Snackable Well-being is our personalised, online approach to delivering valuable, well-researched, easy-to-implement well-being content across a broad range of topics—**Mind, Body, Relationships, Finances, and Work**.

Our platform works just like so many of the social media applications your employees already use and love, but this is an organisation's very own private network! Snackable Well-being delivers quality content confidentially through the News Feed after an employee selects a topic of interest from our main list.

It takes just a couple of minutes to select preferences, after which employees will begin to receive deliveries of easy-to-consume content from leading industry experts and well-known authors. This individualised approach means it's relevant, and employees can select new topics any time as they complete series, or their needs and interests shift.

Employees may select up to a maximum of three (3) topics at a time.



2.3.1.1: Changing Snackable Well-being topics

- **By web app:** Employees go to "Settings" at the top left of the screen, then scroll to "Snackable Well-being" to change topics.
- **By mobile app:** Employees click on "More" at the bottom right of the screen, then select the Cog icon (displayed as a wheel) in the top right of the landing page to access "Settings." They scroll to "Well-being," then select "Snackable topics" to quickly and easily change main topic areas and subcategories.

NOTE: Snackable Well-being deliveries are individual and visible only to the individual employee. In an effort to continue to improve the breadth of our content, we will report to our customer contacts on the most popular topic areas, but only in aggregate form (personal information of any kind will not be connected to these reports).

2.4: Perks

Employees also have access to exclusive and valuable discounts and savings through the "Perks" drop-down of the Web app or the "Perks" button in the mobile app's main navigation.



Getting married
& buying a home



Family outing & holidays



Birthday & seasonal gifts



Growing your wealth



Raising a child

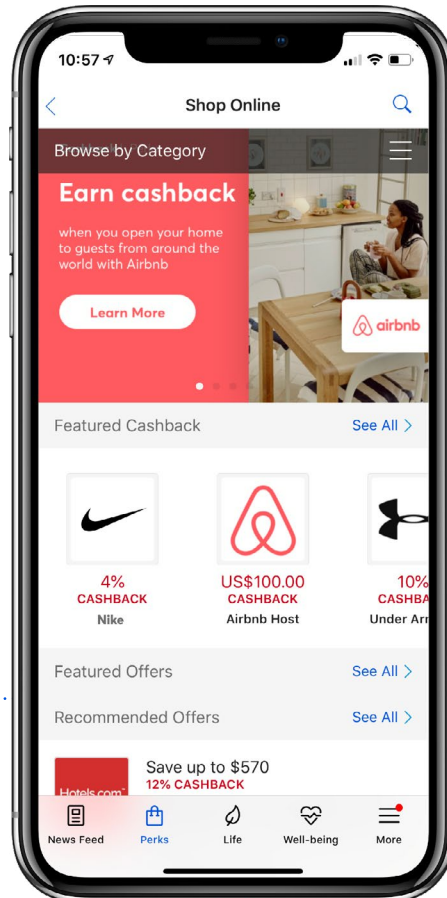


Health and fitness

Featuring a wide range of offers for everyday shopping, entertainment, and lifestyle -- including digital and discounted gift cards for purchase, as well as valuable cashback earned simply by shopping online through the platform -- Employees can use Perks every single day to make their money go further.

2.4.1: Shop Online with cashback

To earn cashback, employees browse hundreds of offers on the platform and follow our exclusive links when making purchases. We clearly display cashback amounts (either in local dollars or percentages) right beneath the offer.



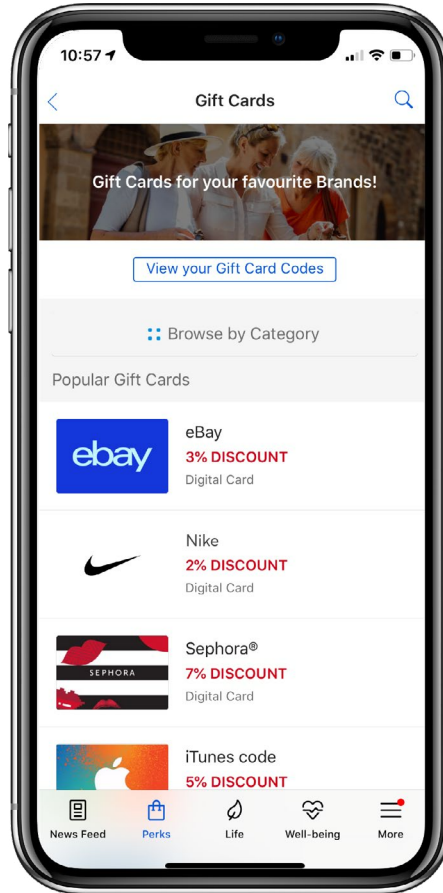
- Once the transaction is completed on the retailer's website, it can take up to 14 days for the cashback to appear in an employee's Wallet as "Tracked."
- It can take up to 60 days to be confirmed as "Available to withdraw," depending on the retailer's return policy.
- When the amount in an employee's Wallet exceeds \$5, he/she can transfer it to a linked PayPal account.

NOTE: In order for cashback tracking to take place, employees must be sure not to refresh or navigate away from the page. In doing so, the "cookies" trail will be broken, and employees will need to restart the purchase process.

Offers subject to change without notice

Employees can also share our exclusive offers with others by email, enabling friends and family to benefit from our special deals. And the added bonus: Employees benefit from the resulting extra cashback we credit to their Wallets!

2.4.2 Discounted Digital Gift Cards



When purchasing digital Gift Cards through the platform, employees enjoy an exclusive discount off the purchase price (clearly quoted on the platform).

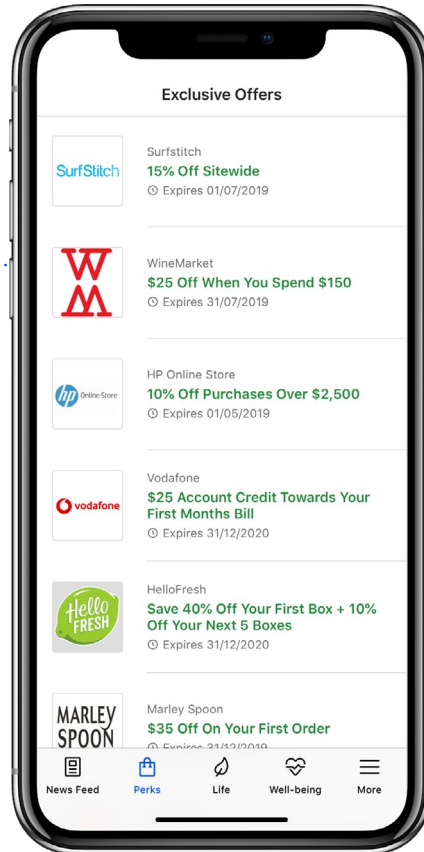
Our Gift Cards are digital and instant, meaning that as soon as an employee makes a gift card purchase, we'll email a link to the redemption code.

2.4.2.1: How to purchase a gift card on the platform

- To purchase a card, employees click on "Gift Cards" in the Perks drop-down menu, search via the Categories section, or use the Search Bar at the top of the page.
- Once a gift card is selected, they review its terms and conditions before purchase, and select how much to apply to the gift card. We will display how much the card will be worth, and the total cost with the discount.
- Employees confirm their email address, enter payment information, and save the details securely for future purchases before clicking on "Buy now".
- Then, they review the confirmation page. We will send a confirmation email containing a link to the digital gift card to the employee's inbox, and the code will be stored in the platform within the "View your Gift Card Codes" section.

2.4.3 In-Store & Exclusive Offers

Our exclusive collection of In-store Offers provides employees with instant rewards while shopping at bricks and mortar locations.



With our Exclusive Offers, employees can save every day on items such as brand name retail and online merchandise, car rentals, special events, home technology, subscriptions, travel, and more.

Employees simply present the app at checkout for an immediate discount on their purchase, with retailers ranging from popular theme parks and water parks, to gym visits and car rentals.

Employees simply follow the instructions to enter coupon codes or voucher codes on the retailer's site to take advantage of available offers.

Since offers are subject to change and we're always working to improve our offers, employees should check out the platform regularly for the latest and greatest Perks!

Section 3 – Administrator Role & Admin Panel Use

In this section of the guide, we will walk through the Admin Panel and how you use it to manage your Administrator functions.

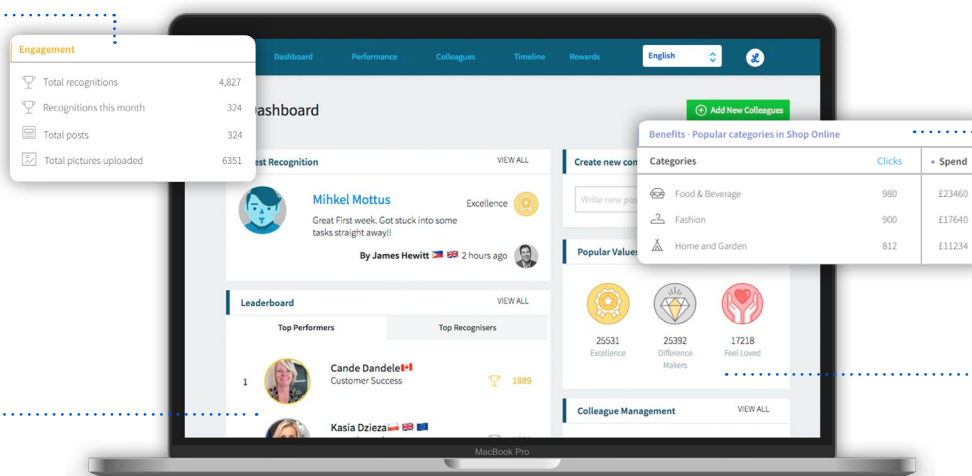
Reminder: If you are both an Administrator and an employee, you can access the Admin Panel -- your organisation's dashboard and administrator tools -- directly through the main platform.

3.1: Admin Panel Dashboard

Once you're in the Admin Panel, you'll view your organisation's Dashboard (an overview of recent activities and summary statistics). The panel's top navigation menu includes:

- Dashboard
- Performance (Recognition Badges, Leaderboard)
- Colleagues (View Colleagues)
- Timeline (Company News Feed posting, and options for filtering your News Feed by post type and timeframe)
- Reports (coming soon!)

Engagement Stats & Total Recognitions



Perks Spend by Category

Most popular Company Values

Leaderboard

3.2: Community/Work

3.2.1 News Feed

As an admin, you can use the News Feed to deliver **Company Posts**, such as benefits announcements, special event notices, executive communications, etc.


3.2.1.1: Company Posts

To create a Company Post, log in to the Admin Panel, choose "Timeline," then **Create new Company Post**.

- Start typing in the field to open the dialogue box.
- You can choose to add an image and select account types to view the Post, ie, shared, dependent and limited accounts.
- You can "Boost Your Post" so it will stay at the top of your News Feed until an employee has viewed it.
- You can "Pin your Post," so it will stay at the top of the News Feed until marked as read by the employee, or unpinned by an admin.
- You can opt to send a push notification to alert employees to a new post, or click to send an email notification as well if your Company Post is critical
- Click "Post."

Create new company post

Write new post...

B / *I* / 

+ Add an image

Sharing options

All × Enter group name...

Shared, Dependant & Limited Accounts
Post will be shown to everyone including people accessing LifeWorks via a shared, limited & dependant account.

Post visibility (optional)

Ensure your post is seen by everyone by making it appear at the top of the newsfeed

[Unreadable]

Send push notification?

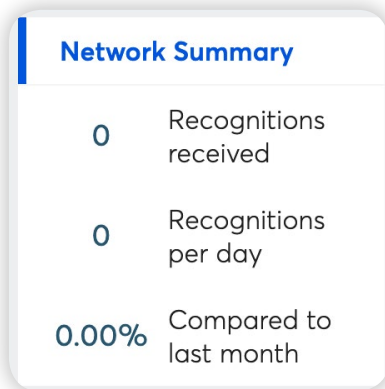
Send email notification?

Under the Timeline tab, you can view posts in your News Feed according to a specific timeframe, and filter by categories you select from a checklist of post types. You also have the ability to delete posts if you need to.

3.3 Recognition

Simply go to "Performance" in the top navigation of the Admin Panel, then select "Leaderboard" from the drop-down to view top recognition recipients and top recognisers.

3.3.1: Admin Panel Recognition Network Summary



As an admin, you can view summary details about your network's Recognition behaviour. View your network's activity by:

- a particular month or across all time
- as a percentage of increase or decrease in Recognitions
- definitions of your value badges and associated artwork
- the most and least popular value badges

3.3.2: Recognition history and how to leverage this data

Your organisation may wish to analyse Recognition data as supplements to 360-degree feedback or performance management cycle, related to a bonus structure, or as a way to reward employees for supporting important values.

For instance, you could reward an employee who achieved the most Recognitions associated with a particular value badge, or you could reward your network's top Recogniser with a special prize (since this is a behaviour you also want to promote).

3.3.3: Recognition Badges

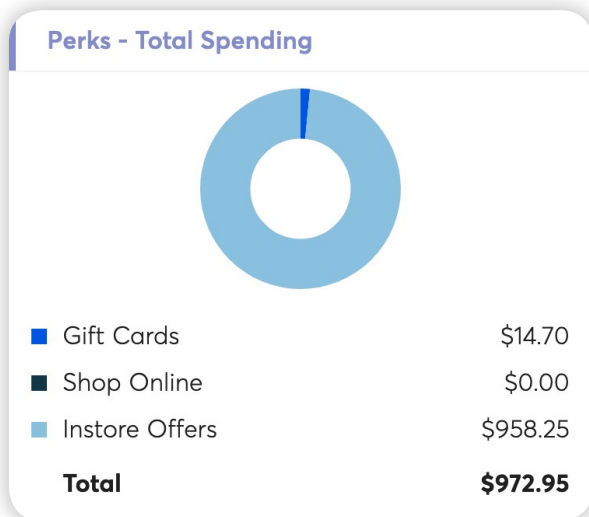
Our platform works just like so many of the social media applications your employees already use and love, but this is an organisation's very own private network! You can select the badges from the Admin Panel, under the Performance drop-down. We recommend selecting 6-10 badges.

3.4: Perks

If you're an employee, you can take advantage of Perks yourself. As an Admin, you can track/measure this valuable employee benefit through the Admin Panel.




Log in, choose "Dashboard" from the top navigation menu, and view multiple Perks statistics just for your organisation, including:

Total Perks Spending categorised by Gift Cards, Shop Online, and In-store Offers






Perks – Popular Categories in Shop Online

Perks - Popular categories in Shop Online

Categories	Spend	Clicks
 Travel	\$0.00	7
 Health & Beauty	\$0.00	3
 Media	\$0.00	3

Perks – Popular Brands in Shop Online

Perks - Popular brands in Shop Online

Brands	Spend	Clicks
 Viator	\$0.00	5
 iTunes	\$0.00	2
 Sephora Canada	\$0.00	2

For any additional questions,
please visit help.lifeworks.com.

