pasito | LOCKTON

LOCKTON WEST'S AI PARTNER

Editing a Benefits Guide

Your AI-native workbench for client deliverable production and management

Today's Agenda

1. Eligibility Classes
2. Editing Guide Content
3. Pasito Toolbar Navigation
4. Page Templates
5. Spanish Translation
6. Sharing a Guide

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Your Pasito Success Team



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Pasito Support
Generalized Support Inbox
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Onboarding in 4 Steps

1. Provide Key Client Account Information
2. Designate Plan Year, Eligibility, and Benefits
3. Upload Plan Documents
4. Select Client Features

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Onboarding Goals

Remember...!

Our goal is to get your team 70-75% of the way to a complete deliverable in a matter of clicks. Instances of manual work, while heavily reduced, should still be expected.

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Who should use Pasito?

Working with Pasito

Fit, support & availability — quick reference

Who is Pasito For?

- Companies under $100k in revenue
- High-maintenance, high-edit clients who love to edit
- Clients who run late on projects and want autonomy over agencies

Pasito vs. EBC

Quick reference for who owns what:

Pasito → structure & workflow

EBC → content

Support Escalation Path

1. Office hours (twice weekly, set times)
2. Email — reply includes a video walkthrough
3. One-on-one sessions

Contact Expectations & Turnaround

24h

Email acknowledgment

48h

Resolution initiation

Proactive communication whenever there's a delay.

Availability & Time Zones

Liam
East Coast hours

Kristina
Central Time hours

Expect responses based on each person's time zone.

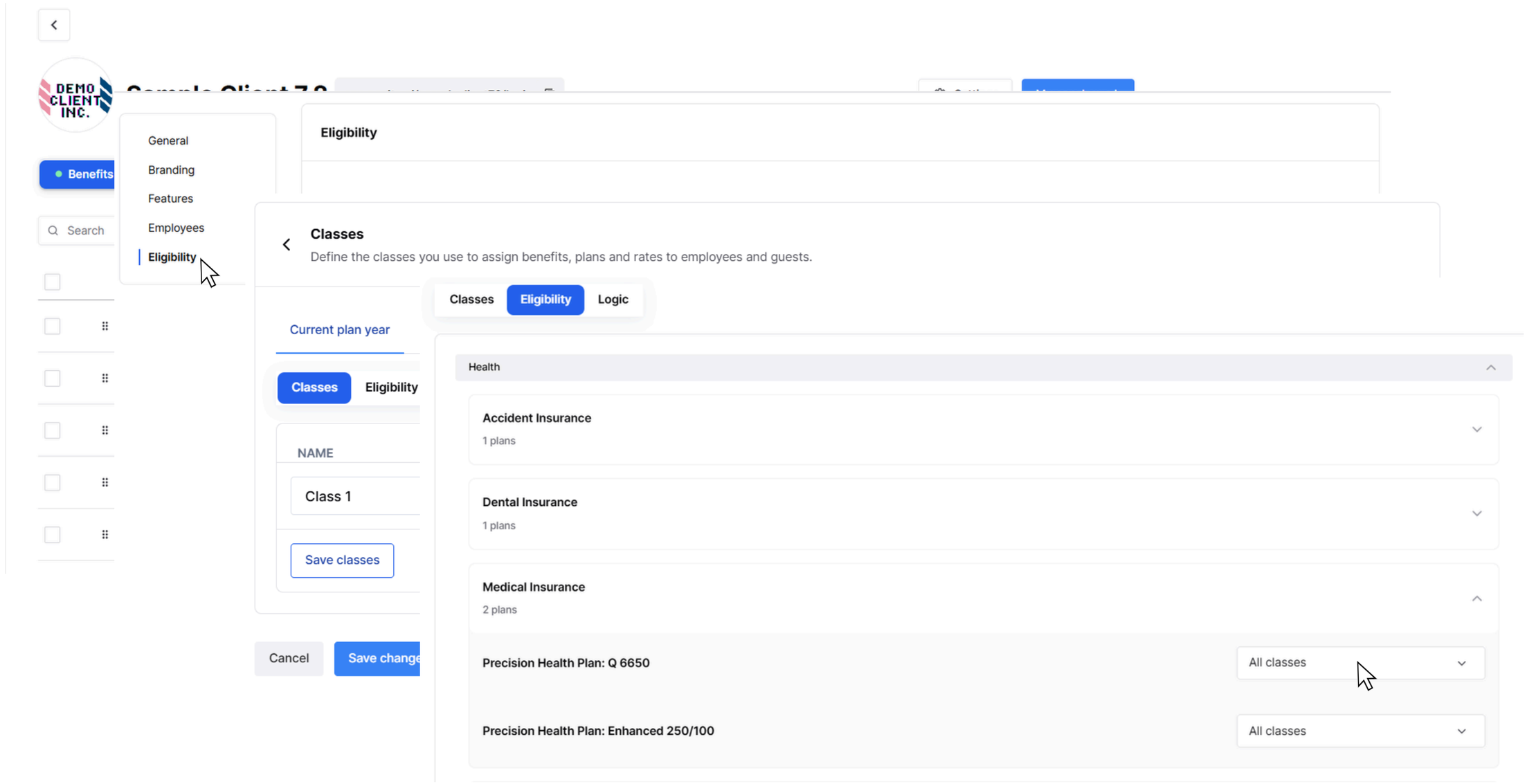
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Triaging Support Needs

1. Scribe FAQ (to be available in EBC)
2. Recurring weekly office hours (to be scheduled)
3. Loom walkthroughs for common questions
4. One-on-one escalations as needed

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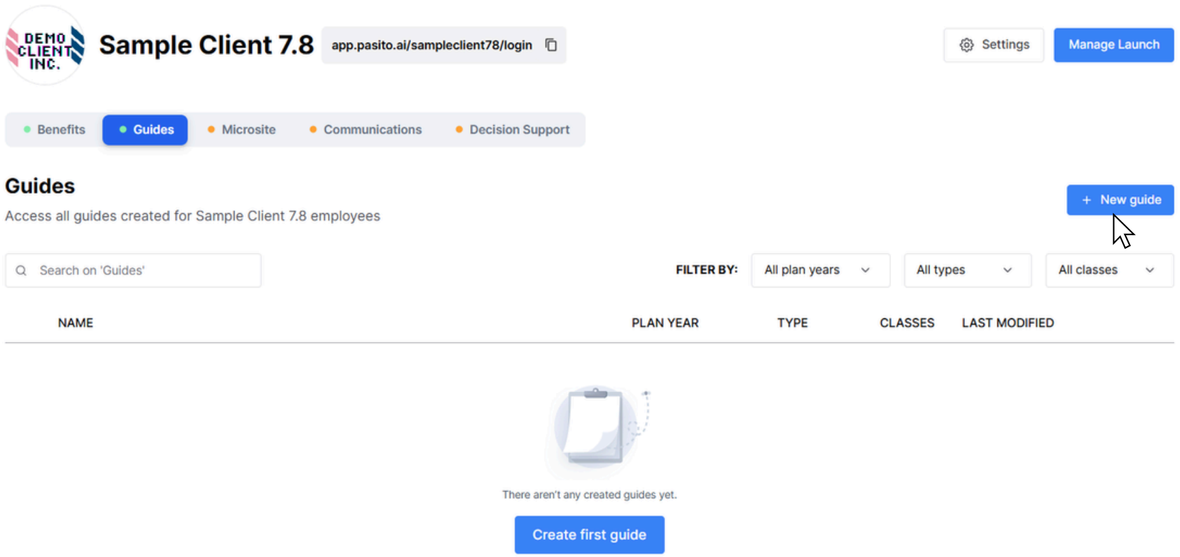
Eligibility Classes in 4 Steps

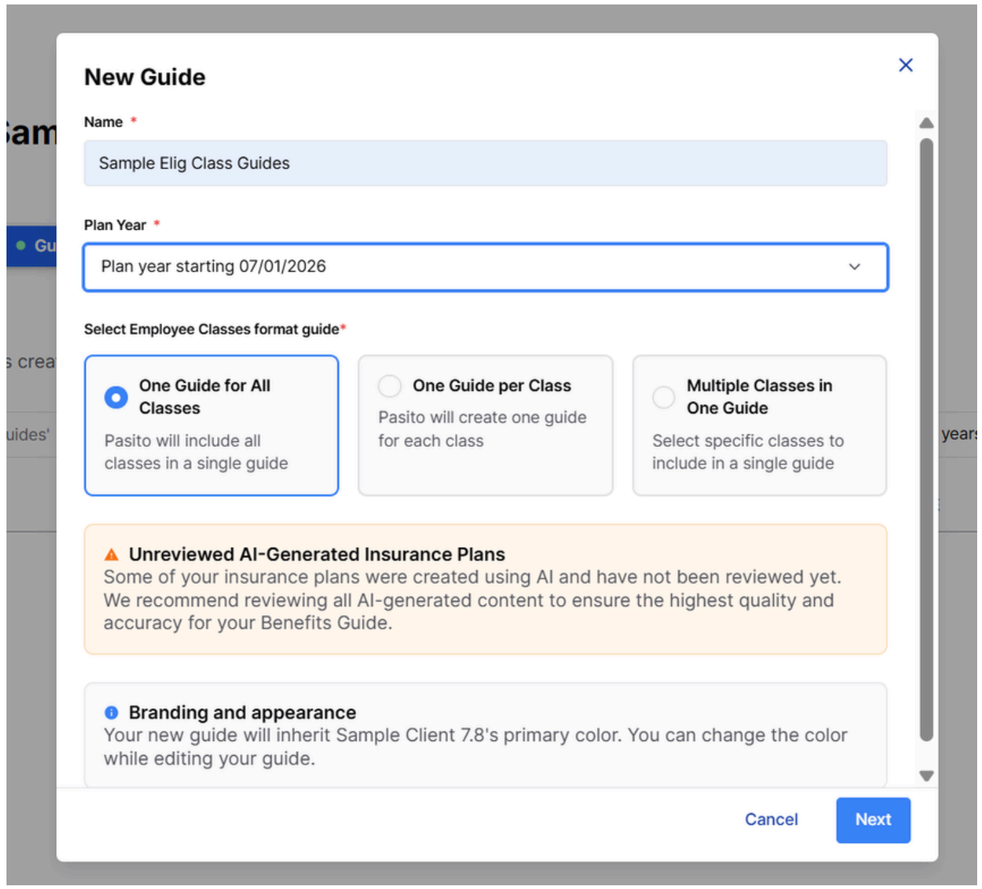


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Eligibility Classes

Once eligibility classes are added, you have several options to create class-specific guides...



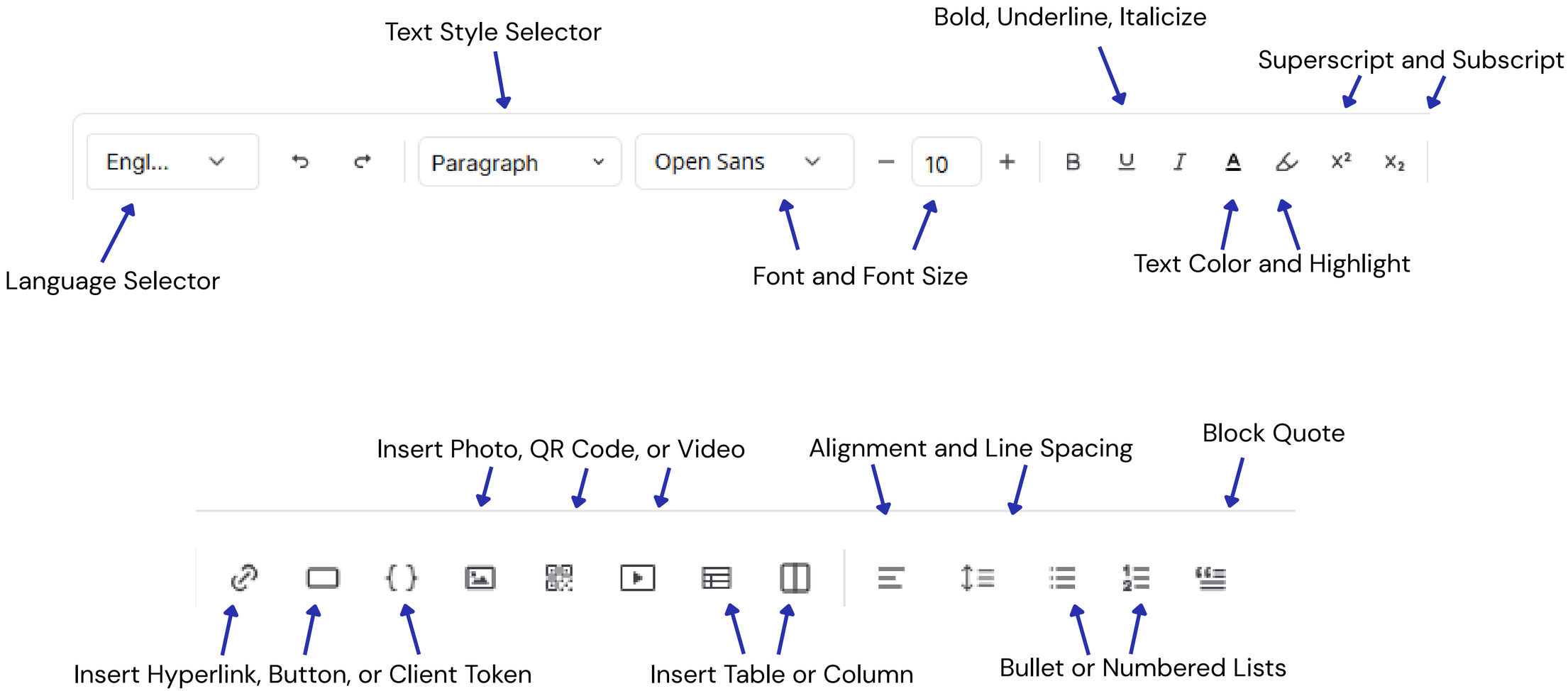


Once the guide is named, there are three guide options to choose from...

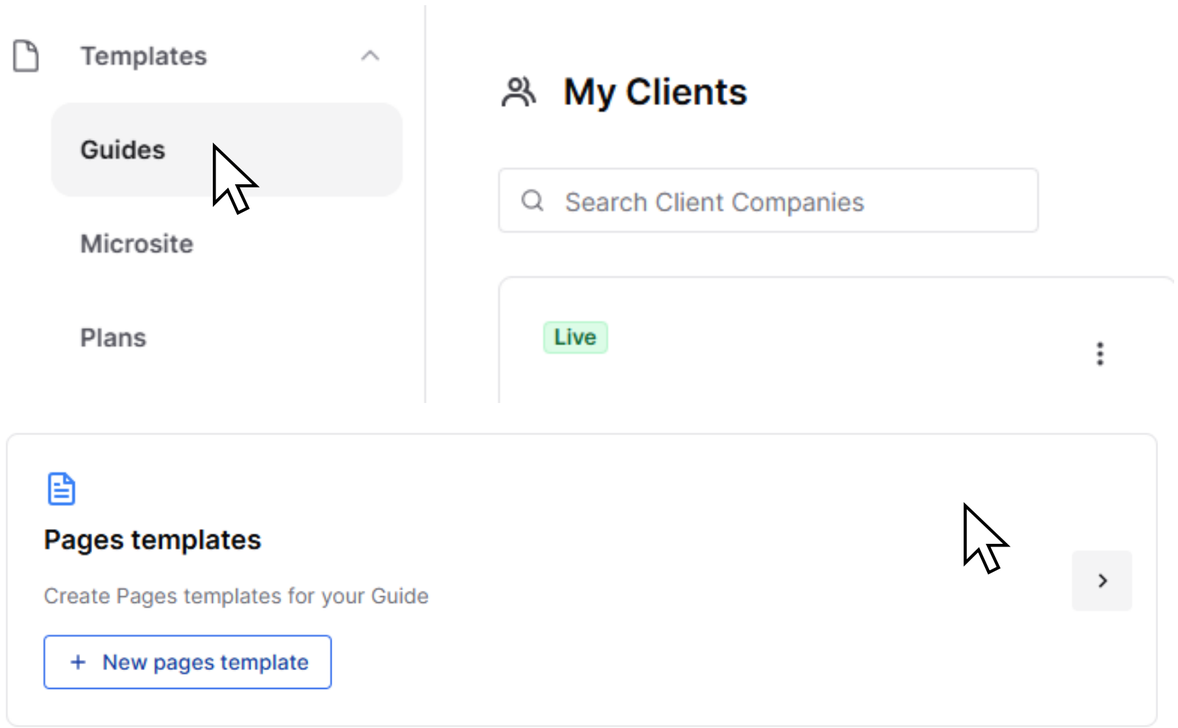
- One guide for all classes
- One guide for each class (will produce multiple guides at once)
- Specific classes in one guide (you can choose which classes to include)

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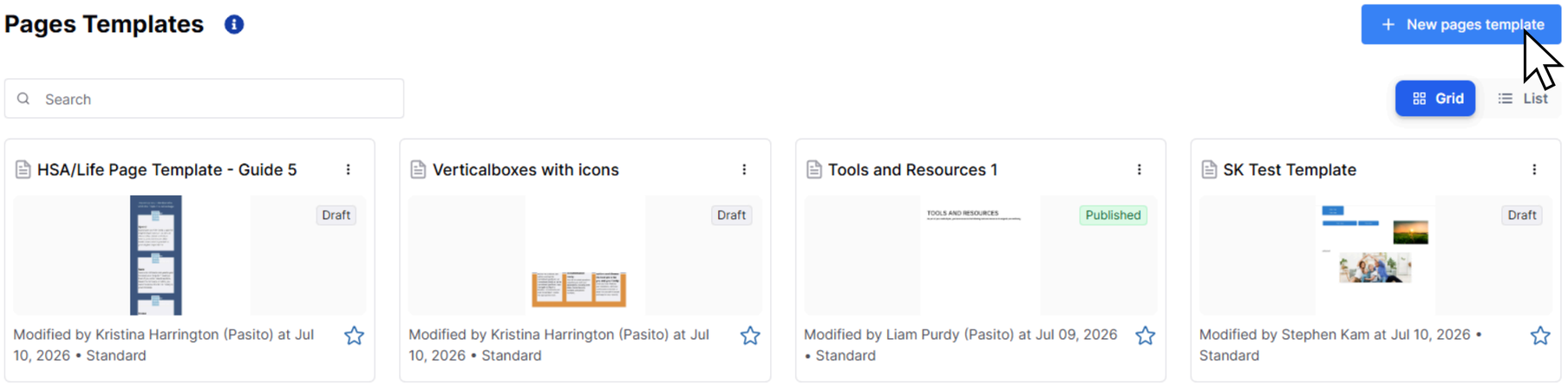
Toolbar Navigation



Page Templates



- Toggle to Templates > Guides
- Click to enter Page Templates
- Click “New Page Template” and create! You can also upload a PDF page or image.



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Thank You!

We look forward to partnering with you as you begin using Pasito.

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Next Steps

Session 2b tomorrow!
Session 3 next week

LOCKTON x pasito