

Configure the Plansource Benefits Administration System

Configuration

The configuration analyst is responsible for implementing the client into the benefits administration system. The analyst will utilize the **Implementation Wizard** along with the **Configuration and System Management Tabs** to complete this process.

Implementation Wizard

Utilizing the documents received in the new client email, the configuration analyst will begin adding the data into the implementation wizard.

Note: Information that is not received in the new client email will need to be gathered from the client during the kick off call meeting.

Configuration Tab

After completing the implementation wizard, additional data might need to be inputted utilizing the configuration tab. This tab mirrors the topics in the implementation wizard and provides additional options and advanced configuration.

System Management Tab

Additional configuration pertaining to licensing, notifications, logos, plugins, content block and coverage level relationships can be found under the System Management Tab.