

PLANSOURCE[®]

Reseller Registration Process

How to Access and Register for a Reseller Foundations Course

Table of Contents

Overview	3
2024 Course Schedule.....	4
How to Register	5

Introduction

This virtual instructor-led course is for Reseller partners and will introduce the fundamental navigation and configuration skills needed to successfully build a client in the PlanSource application using the information found in a Client Requirements Guide (CRG). Participants will also learn how to process a new hire enrollment to test and troubleshoot the build.

Audience

Anyone within the Reseller organization who will be building and configuring clients, and or working with the PlanSource application.

Session Details

- Registration is open from the beginning of the year and closes on Friday at 12 pm EST, one week before the chosen training date, to allow a week for pre-work to be completed.
- Pre-work is sent 1 week before the chosen training dates and is required to be completed and returned by EOB on Friday of that week. Pre-work to include ≈ 2-3 hours of eLearning.
- Foundations Training is Monday – Friday, 9 am – 4 pm EST. Requirements include cameras on, multiple monitor screens, and active participation.
- Assessment grading is completed the week after and pass/fail emails are sent mid to end of the week (depending on the number of participants). A certificate of completion is given for passing scores.
- Classes can accommodate up to 10 participants.

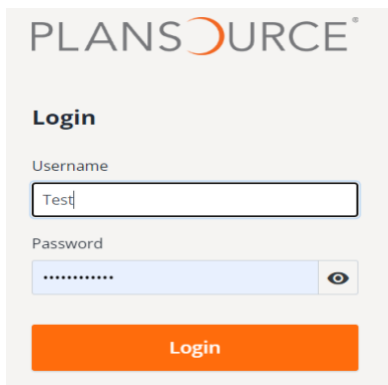
2024 Schedule

Training Week	Registration Closes
1/8/24– 1/12/24	Friday, 12/29/23
1/22/24 – 1/26/24	Friday, 1/12/24
2/12/24 – 2/16/24	Friday, 2/2/24
3/4/24 – 3/8/24	Friday, 2/29/24
3/25/24 – 3/29/24	Friday, 3/15/24
4/8/24 – 4/12/24	Friday, 3/29/24
4/22/24 – 4/26/24	Friday, 4/12/24
5/13/24 – 5/17/24	Friday, 5/3/24
6/3/24 – 6/7/24	Friday, 5/24/24
6/24/24 – 6/28/24	Friday, 6/14/24
7/8/24 – 7/12/24	Friday, 6/28/24
7/22/24 – 7/26/24	Friday, 7/12/24
8/5/24 – 8/9/24	Friday, 7/26/24
8/19/24 – 8/23/24	Friday, 8/9/24
9/9/24 – 9/13/24	Friday, 8/30/24
9/23/24 – 9/27/24	Friday, 9/13/24
10/7/24 – 10/11/24	Friday, 9/27/24
10/28/24 – 11/1/24	Friday, 10/18/24
11/18/24 – 11/22/24	Friday, 11/8/24
12/9/24 – 12/13/24	Friday, 11/29/24

Register for a Session

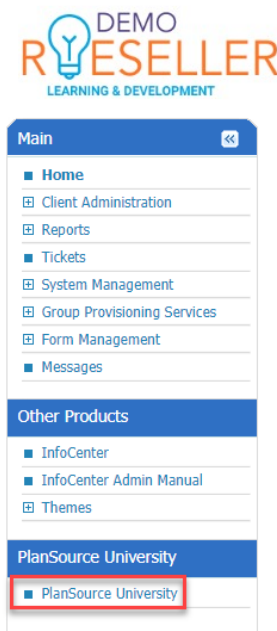
All participants must have an account in the PlanSource Benefits Administration tool and be assigned to the Co-Sourced Broker Reseller Partner Group.

1. Log in to the [PlanSource Ben Admin application](#).

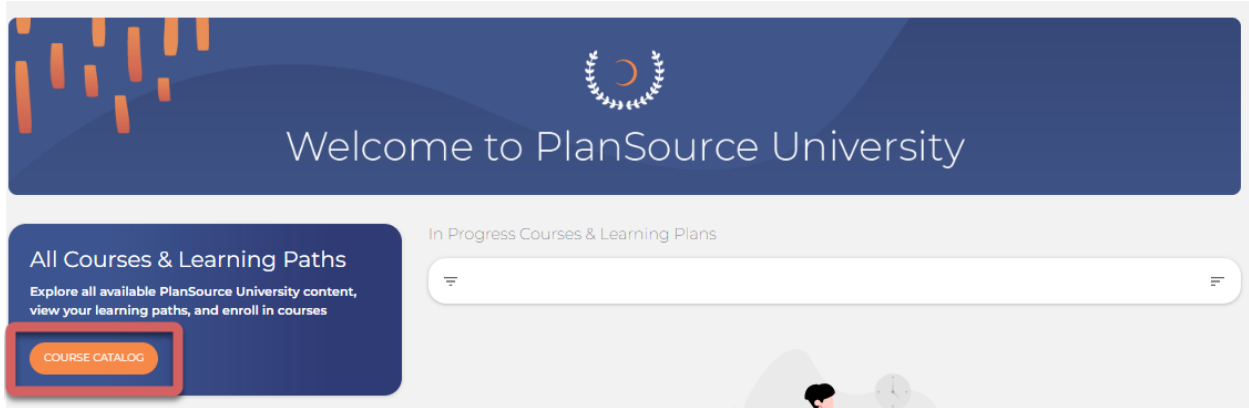


The image shows the PlanSource login interface. At the top is the PlanSource logo. Below it is the heading "Login". There are two input fields: "Username" with the text "Test" and "Password" with a masked password ".....". To the right of the password field is an eye icon for toggling visibility. At the bottom is an orange "Login" button.

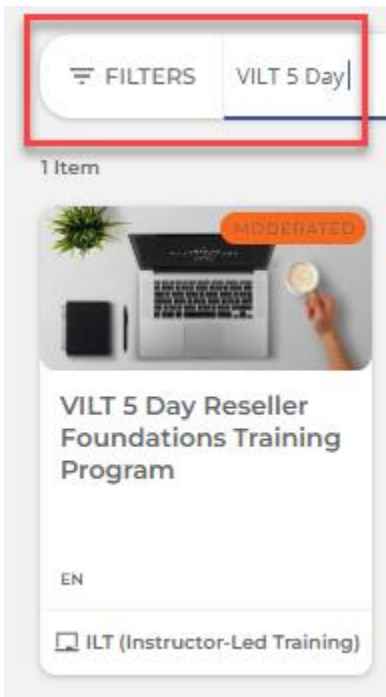
2. Access PlanSource University from the Reseller/Broker page.



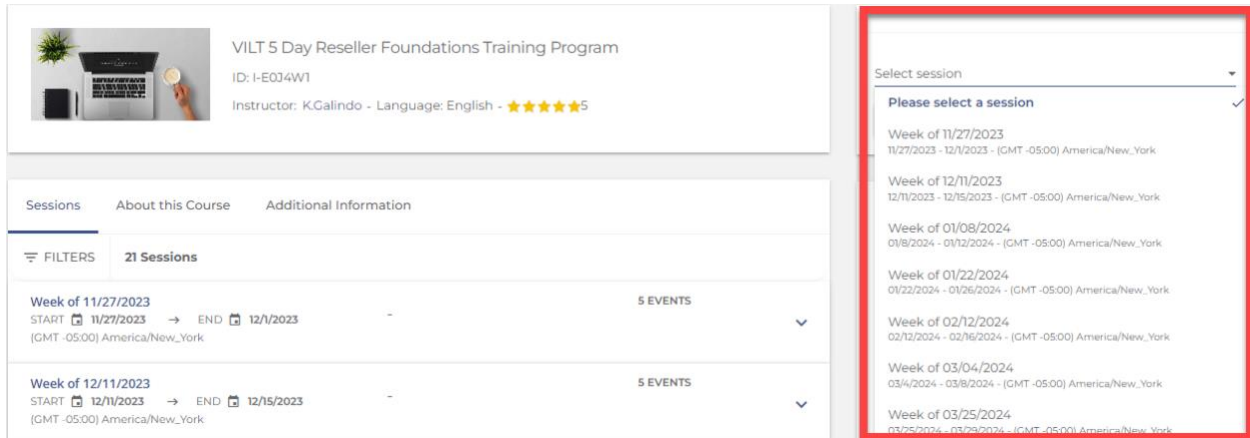
3. Once you are in PSU, select the course catalog.



4. Using the search field at the top, search for VILT 5 Day Reseller Foundations Training Program and select it.



5. Select a session from the drop-down arrow.

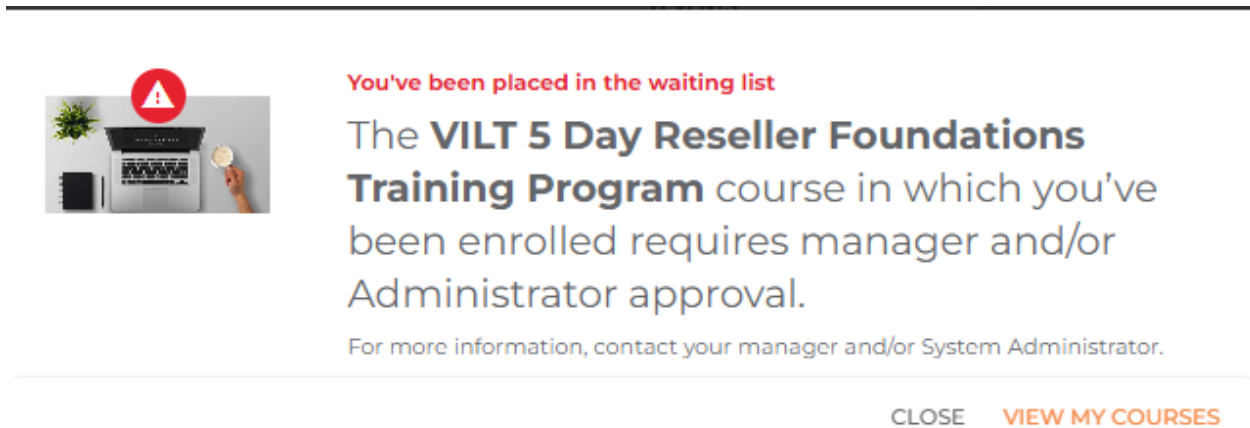


The screenshot shows a course page for "VILT 5 Day Reseller Foundations Training Program" (ID: I-E0J4W1) by instructor K.Galindo. The course has a 5-star rating. On the right, a dropdown menu is open, titled "Please select a session", listing several weekly sessions from 11/27/2023 to 03/25/2024. The main content area shows a table of sessions with filters and two visible rows, each for a week with 5 events.

6. Click on Enroll



You will be placed on the waiting list, which will generate an email to the facilitator for approval.



The notification banner features a red warning icon (a triangle with an exclamation mark) on the left. The text reads: "You've been placed in the waiting list" in red, followed by "The **VILT 5 Day Reseller Foundations Training Program** course in which you've been enrolled requires manager and/or Administrator approval." in blue. Below this, it says "For more information, contact your manager and/or System Administrator." in grey. At the bottom right, there are two links: "CLOSE" and "VIEW MY COURSES".

Once approved for the session, you will receive an email confirmation with more details about the course.