

PLANSOURCE<sup>®</sup>

## Reseller Registration Process

How to Access and Register for a Reseller Foundations Course

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# 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 – 5 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.

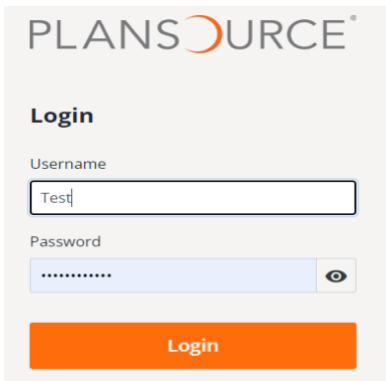
# 2024/Jan 2025 Schedule

| <b>Training Week</b> | <b>Registration Closes</b> |
|----------------------|----------------------------|
| 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           |
| 1/6/25 – 1/10/25     | Friday, 12/27/24           |
| 1/27/25 – 1/31/25    | Friday, 1/17/25            |

## Register for a Session

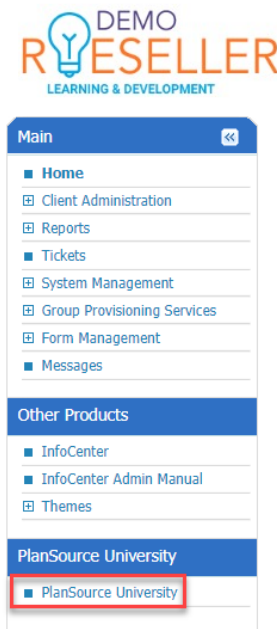
All participants must have an account in the PlanSource Benefits Administration tool and be assigned to the Co-Sourced Broker Reseller Partner Group.

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

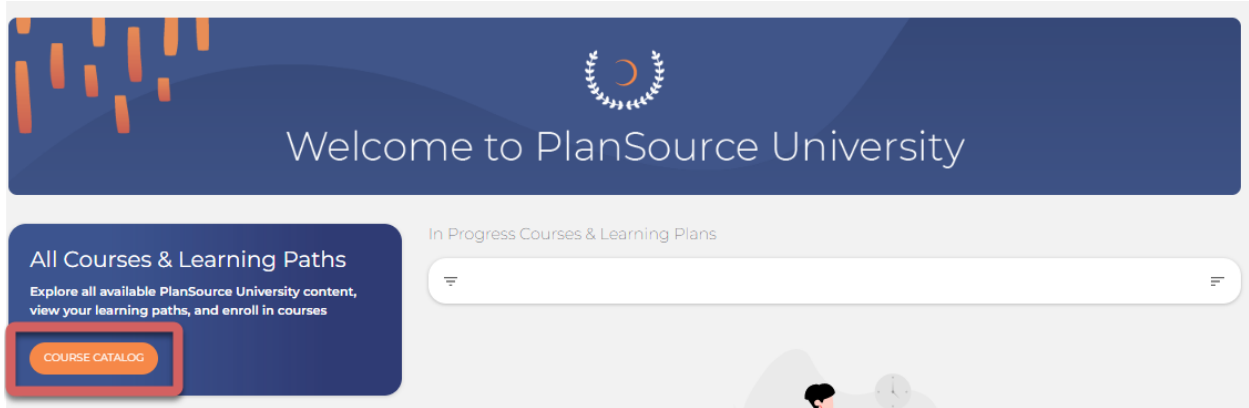


The image shows the PlanSource login interface. At the top is the PlanSource logo. Below it is the heading "Login". There are two input fields: "Username" with the text "Test" and "Password" with a masked password ".....". A "Login" button is located at the bottom of the form.

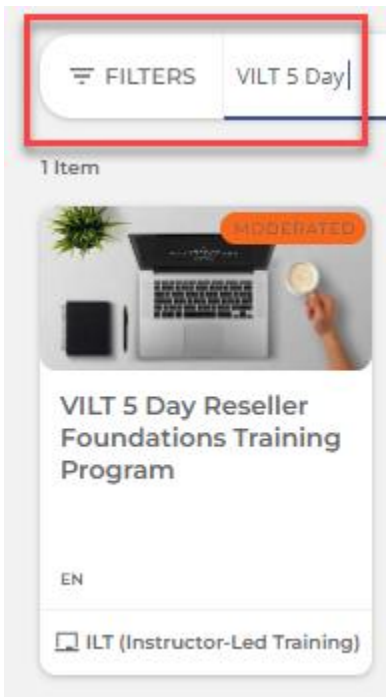
2. Access PlanSource University from the Reseller/Broker page.



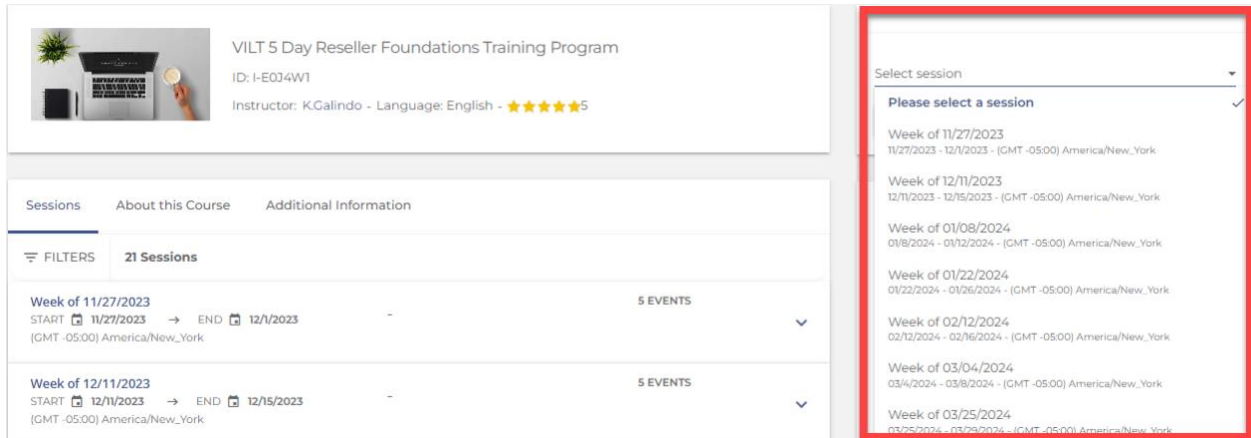
3. Once you are in PSU, select the course catalog.



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.



VILT 5 Day Reseller Foundations Training Program  
ID: I-E0J4W1  
Instructor: K.Galindo - Language: English - ★★★★★5

Sessions About this Course Additional Information

FILTERS 21 Sessions

Week of 11/27/2023  
START 11/27/2023 → END 12/1/2023  
(GMT -05:00) America/New\_York 5 EVENTS

Week of 12/11/2023  
START 12/11/2023 → END 12/15/2023  
(GMT -05:00) America/New\_York 5 EVENTS

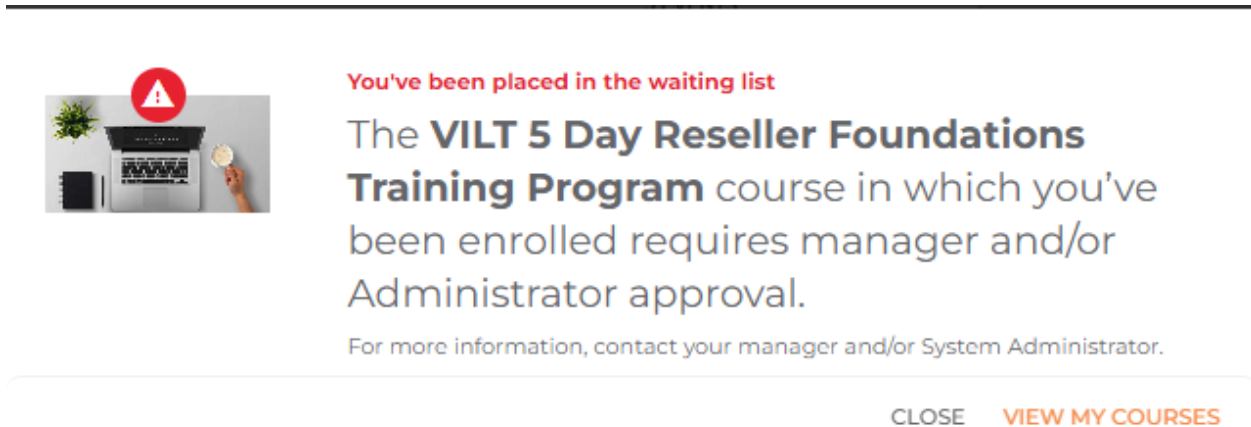
Select session


Please select a session ✓

- Week of 11/27/2023  
11/27/2023 - 12/1/2023 - (GMT -05:00) America/New\_York
- Week of 12/11/2023  
12/11/2023 - 12/15/2023 - (GMT -05:00) America/New\_York
- Week of 01/08/2024  
01/8/2024 - 01/12/2024 - (GMT -05:00) America/New\_York
- Week of 01/22/2024  
01/22/2024 - 01/26/2024 - (GMT -05:00) America/New\_York
- Week of 02/12/2024  
02/12/2024 - 02/16/2024 - (GMT -05:00) America/New\_York
- Week of 03/04/2024  
03/4/2024 - 03/8/2024 - (GMT -05:00) America/New\_York
- Week of 03/25/2024  
03/25/2024 - 03/29/2024 - (GMT -05:00) America/New\_York

6. Click on Enroll

ENROLL (WAITING LIST)





**You've been placed in the waiting list**

The **VILT 5 Day Reseller Foundations Training Program** course in which you've been enrolled requires manager and/or Administrator approval.

For more information, contact your manager and/or System Administrator.

CLOSE VIEW MY COURSES

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

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