PLANSOURCE®

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 – Thursday, 10 am – 3 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.

- **Classes are subject to cancellation if we have less than 4 participants. Registered participants will be notified of any cancellations 1 week prior to the scheduled session.**
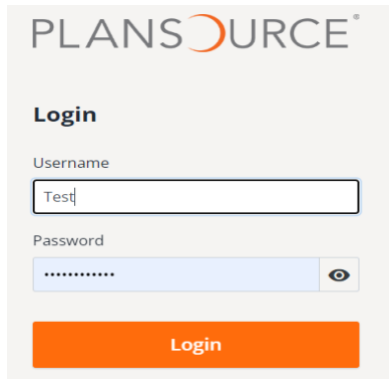
2025 Schedule

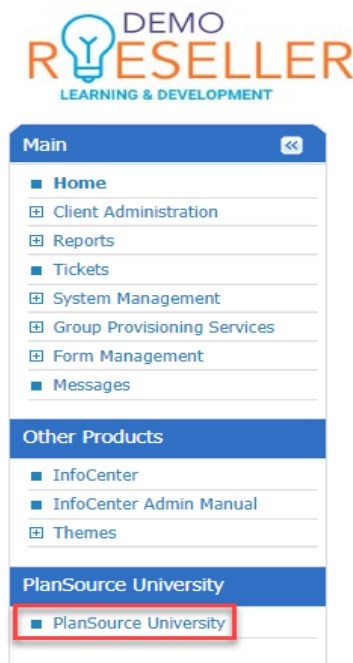| Training Week	Registration Closes
1/6/25 – 1/10/25	Friday, 12/27/24
1/27/25 – 1/31/25	Friday, 1/17/25
2/10/25 - 2/14/25	Friday, 1/31/25
3/3/25 – 3/7/25	Friday, 2/21/25
3/24/25 – 3/28/25	Friday, 3/14/25
4/7/25 – 4/11/25	Friday, 3/28/25
4/28/25 – 5/2/25	Friday, 4/18/25
5/19/25 – 5/23/25	Friday, 5/9/25
6/23/25 – 6/27/25	Friday, 6/13/25
7/21/25 – 7/25/25	Friday, 7/11/25
8/18/25 – 8/22/25	Friday, 8/8/25
9/15/25 – 9/19/25	Friday, 9/5/25
10/20/25 – 10/24/25	Friday, 10/10/25
11/17/25 – 11/21/25	Friday, 11/7/25
12/8/25 – 12/12/25	Friday, 11/28/25

Register for an Event

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

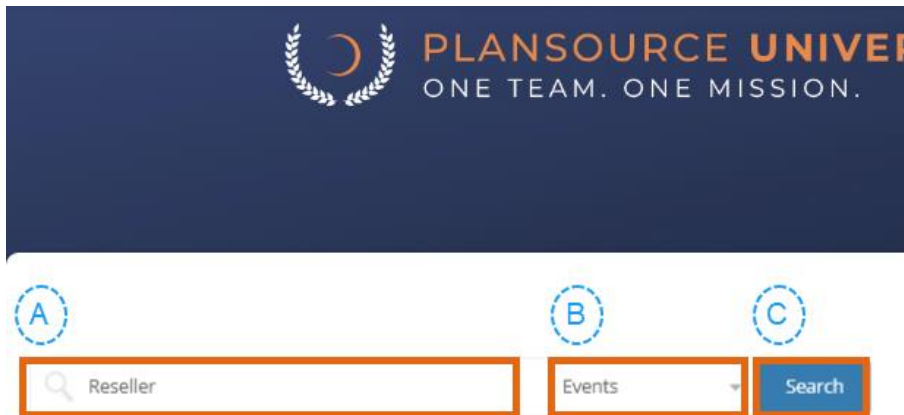1. Log in to the [PlanSource Ben Admin application](#).
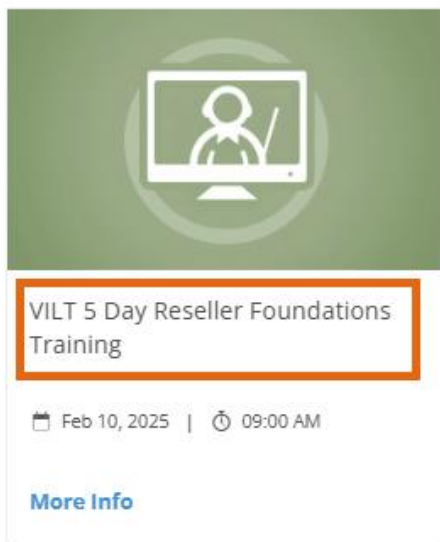

2. Access PlanSource University from the Reseller/Broker page.

3. Once you are in PSU (PlanSource University)
   a. Type Reseller in the search box.
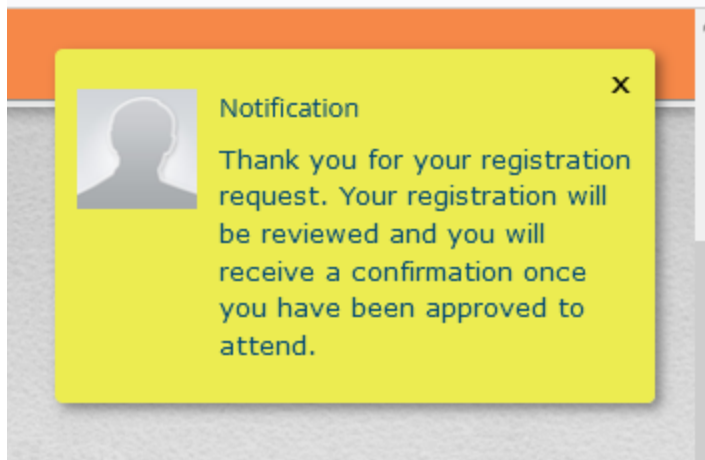   b. Change the drop down menu to Events.
   c. Click the Search button.

4. Select the upcoming VILT 5 Day Reseller Foundations Training link to see all sessions.

VILT 5 Day Reseller Foundations Training

Feb 10, 2025 | 09:00 AM

More Info

5. Select the **Register** button for the class you want to attend.

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.