



## In-Person Training

### ■ Overview

The **five day** live course is intended for brokers who are new to the bCEnroll™ product platform of benefitexpress and are self-implementing their first employer group(s). The course is also recommended for agencies who have established groups currently using bCEnroll™ product platform of benefitexpress or a pending implementation project and would like to train their new employees using the system for the first time.

In this course you will learn to manage a successful implementation project and how to effectively support your client(s) following implementation.

### ■ Schedule

April 30 - May 4, 2018

July 9 - 13, 2018

September 10-14, 2018

### ■ Prerequisites

Successful completion of this course will require the following:

- Working knowledge of computers and web browsers
- Basic knowledge of employee benefit terms and processes
- Group currently using the bCEnroll™ product platform of benefitexpress, or a pending implementation project
- Basic to advanced understanding of Excel

## ■ Training Course Objectives

- Understand the project work flow and data requirements of a typical implementation project
- Work with benefitexpress and provide effective support to your client upon completion of implementation
- Harness capabilities and customization of employee self-service enrollment
- Comprehend advanced capabilities of the system (COBRA, managing evidence of insurability requirements, qualifying events management, etc.)
- Configure system level variables to the group's specifications
- Develop mechanics of benefit plan design, including how to design and build benefit plan offerings
- Import / export employee, dependent, and election data
- Customize the website appearance for the group

Upon completion of this course, you will be empowered to implement a new group on the bCEnroll™ product platform of benefitexpress or conduct a renewal for an existing group with minimal support from the benefitexpress team.

## ■ Key Takeaways:

- Perform system administration tasks such as managing user accounts, system rules, qualifying life events, etc.
- Produce and maintain employee / dependent data and election records
- Help your employer groups customize the system to meet their needs
- Use system functionality such as reports, history files, and audit trails to research and troubleshoot
- Create and maintain the management reports required for benefit administration purposes
- Complete build of the most common implementation packages and employer benefit offerings
- Import all census and elections data