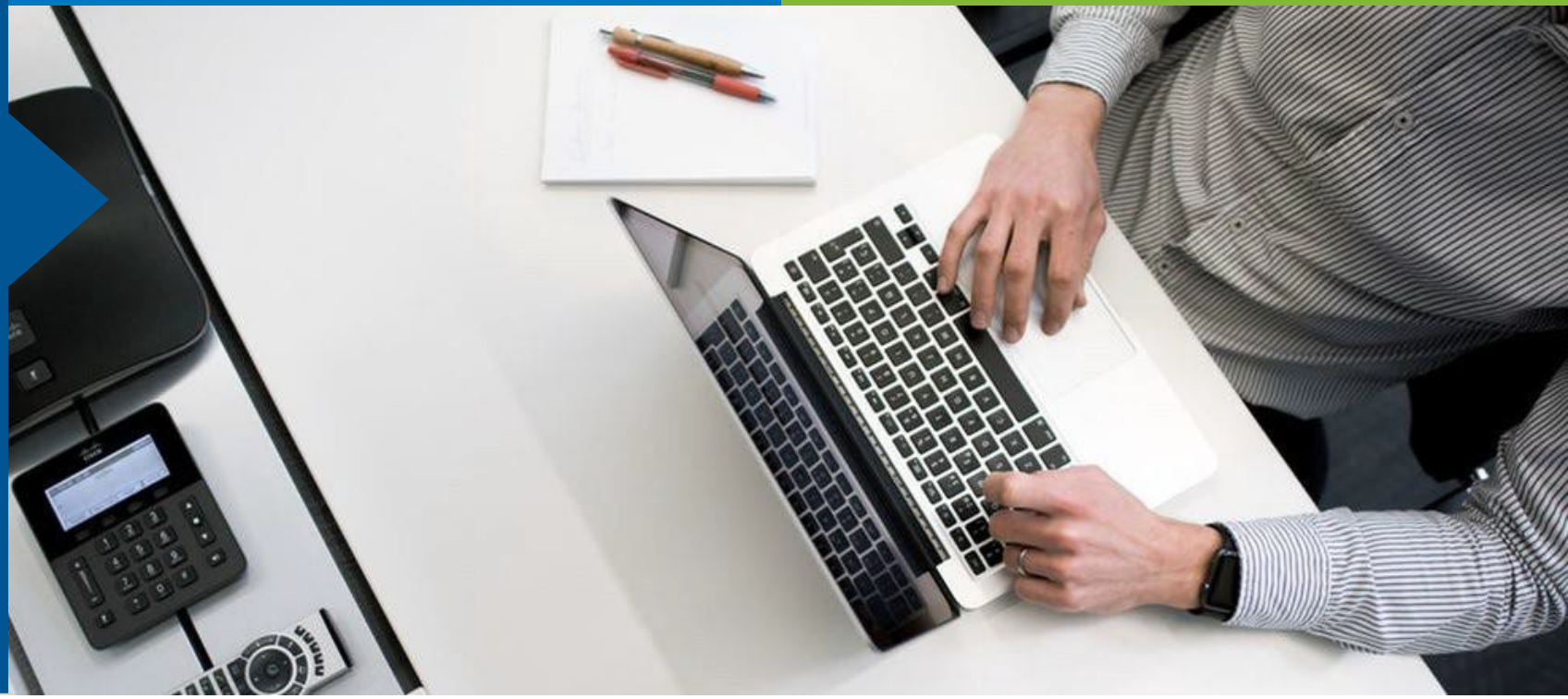


# BenefitMall

## AVAILABLE TRAINING



This training is open to all broker groups with no limit on attendance and includes session-specific topics. Register for any of the sessions below to save your seat.

### Agency Workspace: Introduction and Overview

*Duration – 60 mins*

This session provides a review of Agency Workspace and its basic features and functionality. Topics covered:

- Logging In
- Basic Navigation & Dashboard
- Users and User Management
- Client Management
- Quoting
- Starting and Submitting Enrollments
- Help Resources

Date	Time
April 15	<u>11:00 AM CDT</u>
April 16	<u>1:00 PM CDT</u>
April 20	<u>1:00 PM CDT</u>
April 21	<u>8:00 AM CDT</u>

### Client Ready Quote System® : Basics

*Duration – 60 mins*

This session provides a review of CRQS and its basic features and functionality. Topics covered:

- What is CRQS?
- Getting to know the CRQS Dashboard
- Creating a Quote
- Creating a Proposal

Date	Time
April 23	<u>9:00 AM CDT</u>
April 24	<u>12:00 PM CDT</u>

### Online Enrollment: Application Overview

*Duration – 60 mins*

This session provides a high-level overview of the Quote to Enroll process from start to finish and a review of the Online Enrollment Application.

Topics covered:

- What is Quote-to-Enroll?
- Starting Enrollment
- Adding Census Information
- Adding and Managing Plans
- Submitting Enrollment to BenefitMall
- Getting to know the Online Enrollment Dashboard
- Inviting Employees
- Employee Election Process

Date	Time
April 28	<u>9:00 AM CDT</u>
April 30	<u>12:00 PM CDT</u>