



2018 DIRECTORY OF EDUCATIONAL SERVICES

SYSTEM	MAY	AUG	NOV	FEE	DAY	TIME
PE Topics Day 1	7		5	\$350	Monday	8:30-4:30 (CST)
PE Topics Day 2	8		6	\$350	Tuesday	8:30-4:30 (CST)
PE Import/Export (.dia)	9		7	\$300	Wednesday	8:30-1:30 (CST)
Cash Balance/ 401(k) Combined Admin	--	20	--	\$350	Monday	8:30-4:30 (CST)

_____ (_____) _____
 Company Name Contact Phone DATAIR Acct. No.

 Contact Name Contact Email

I/We would like to attend the following session(s) for the month of May August November:

Print Attendee name(s) below:	PE Day 1 \$350	PE Day 2 \$350	Import/ Export \$300	CB/401(k) Admin \$350	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

Subtract \$100 for each person that is signed up for 2 or more classes in the same training week \$ _____

TOTAL \$ _____

Method of Payment: **(Payment is required with registration and cannot be charged to account)**

_____ Check enclosed made payable to **DATAIR Employee Benefit Systems, Inc.**

_____ Credit Card - Please charge my: _____ AMEX _____ VISA _____ MasterCard

Cardholder's Name: _____ Credit Card #: _____

CVV/CVC (3 digits on the back of a Visa or MasterCard or 4 digits on the front of an American Express card): _____

Credit Card Billing Address: _____

Signature: _____ Exp Date: _____

NOTE: Please do not make flight or hotel reservations until you receive confirmation. Registration Forms received less than 2 weeks prior to training are subject to class availability.

Cancellation Policy: A full refund will be issued for cancellations received more than 5 business days prior to class; cancellations received less than 5 business days will be charged the full registration fee.

Return the Registration Form to:

DATAIR Employee Benefit Systems, Inc., Attn: Training Department

735 North Cass Avenue, Westmont, IL 60559-1100 | Fax: (630) 325-2660 | E-mail: info@datair.com

TRAINING TIPS

In order to benefit from system training, you should have some familiarity with the system and sufficient expertise in the employee benefits area handled by that system. Please do not come for training too soon; that is before you have at least installed and experimented with the system in your office. We recommend at least 2 weeks of exposure to the system before you attend the training session. This way you can “know what you don’t know” and make your time with us as productive as possible. Some of the classes will also work in groups to get hands-on training.

Also, you should make plans to spend time practicing on a test plan as soon as you return from the training session. If you do not put what you learn into practice immediately, you may lose much of the benefit of the training. You will reinforce what you’ve learned in class by setting up a small test plan and experimenting with it. It’s a good idea to have some level of comfort with the software before you tackle your largest and most complicated plans. We also suggest that the DC and DB attendees stay for the Import and Export (.dia) session to learn how to get the most benefit from the data import and data entry tools!

To make the most out of your training experience, please arrange your travel plans so that you are available for your entire session.

CONTINUING EDUCATION CREDITS

Continuing Education certificates are available for all attendees of classes in Westmont or In-Person Customized Training. Training certificates should be submitted for professional designation credit under the rules provided by each organization. Training classes are *not* pre-approved for continuing education.

DATAIR’S WEBSITE AND E-MAIL

DATAIR’s website and e-mail provide for the exchange of electronic mail, transfer of plan data files, and to allow downloading of program updates to releases. In addition, news about each of DATAIR’s systems is available at our website. Join our system discussion forums for the exchange of ideas and information about topics of interest to the employee benefit community. Visit us at <http://www.datair.com> and e-mail us at info@datair.com.

EDUCATIONAL CLASSES

PE Topics - Day 1 (May 7 & Nov 5)

This one day session will cover the system selections and options for plans. Setting up and navigating through the screens will be covered in detail. This session will introduce you to creating the plan, running the valuation, reports, and an overview into the magic of import and export.

- System Navigation
- Creating New Plans
- Creating and using Default Plans
- Sources and Eligibility
- Investments
- Accounts and Transactions
- Import/Export - magic of including Census
- Transactions, including shares
- Receivable Elections options
- Reports – options, setting up, and groups
- Employees including Edit Grid
- Death Benefits/Life Insurance

PE Topics – Day 2 (May 8 & Nov 6)

This one day session will cover coding advanced options with a detailed examination of the entire system. Emphasis will be on 401(k) plans. Working knowledge from using the system or the PE Topics – Day 1 class is required for this session.

- New Comparability including maximizing formula
- Database Utilities
- Safe Harbor Plans
- Cross Tested Allocations/Testing
- ADP/ACP Tests
- Imports for Investment Companies
- Loan Processing
- Updating including periodic valuations
- Plan Comparison
- Non-Discrimination Testing selections, options, and reports
- Combined plan testing using Master Plan
- Multi-Plan Operations

PE Import / Export (.dia) (May 9 & Nov 7)

This ½ day session will cover the aspects of importing and exporting with PE. Learn how to use the powerful data handling tools available to Pension System subscribers. We strongly recommend that all DC and DB session attendees also attend this class.

- Customizing sample templates
- Creating new templates
- Options
- Search Feature
- Conditional Processing (Rules)
- Zipping files
- Translation Tables
- Transaction Filter

***NEW* Cash Balance/401(k) Combined Plan Administration (August 20)**

This class will focus on the setup of the Cash Balance and 401(k) combined plans, issues with adding the second plan later to an existing plan, issues in the first year and second year, specific document provisions, and using the master plan for testing.

- Cash Balance – Basics of cash balance plans
- Setting up a cash balance plan
- Coordinating provisions with a 401(k) plan
- Proposal and Comparison Reports
- Cash Balance Reports
- Combo DB/DC testing using Master Plans
- Pros and cons of cash balance
- Cash balance document overview

CUSTOMIZED SYSTEM TRAINING

If you cannot attend on a set date and/or wish to have system training that is tailored to your needs, you can attend customized training. Below are descriptions of some of the classes that can be offered. Please contact us for more information or to schedule customized training.

At DATAIR: You come to the Westmont office for small group and individual classes.

In-Person: We will come to your office and conduct training tailored for your needs. Our fee for these services is \$2,000 per day plus expenses up to 12 people. Travel time in excess of ½ day will be billed at \$2,000 per day in ½-day increments up to one additional day.

The following classes are some of the additional available sessions -

DB Advanced Topics

This is an intensive one-day course that covers all options in the system. Some previous defined benefit experience is required. Actuarial concepts and system coding for desired valuation results will be discussed. Working knowledge from using the system or the PE Introduction class is required for this session.

- Cash Balance Plans
- Combo DB/DC testing using Master Plans
- Coding benefit formulas and accrual methods including class based formulas
- Valuation and Testing assumptions
- Funding methods and detailed system calculations
- AFTAPs and discounting contributions
- BOY vs. EOY coding & testing differences
- Funding Election Forms
- Funding Relief options
- Deemed Burns
- Updating to next plan year and how mini-updates are beneficial
- Average compensation and service calculations
- Minimum/maximum costs including setting up bases
- Sole Proprietor and Partnership calculations
- Transfer of Schedule SB to 5500s

Report Writer (RW)

This session for Report Writer (RW) will cover topics including how to modify current reports using the templates, using group field properties to get desired output, and creating basic programming script for conditional field properties. Field selection options along with advanced options will be discussed.

- Using the Wizard and Modifying templates
- Grouping Data (how this affects the report output)
- Using field properties (including those used for summing or subtotaling data)
- Setting up strings and math formulas
- Adding simple programming Script for:
- Conditional field properties (show/hide a field based on the other field values)
- Incorporating fields within written paragraphs
- Addition of Sub-reports
- Counting (plans, employees, balances)

DATAIR SYSTEM WEBINARS

DATAIR provides free webinars throughout the year. Topics are current and relative to features and enhancements in the software. Topics follow the trends for support requests as well as any regulation changes that require system changes.

The webinars are announced in the DATAIR Discussion Forums approximately a week before the webinar. Attending the live webinars provides the opportunity to ask questions while the webinar is in session. The webinars are recorded and available within 48 hours of the live webinar. The recorded webinars can be watched as many times as desired with no limit to the number of people in your office watching.