



**NOVEMBER 2019 DIRECTORY OF EDUCATIONAL SERVICES**

SYSTEM	NOV	FEE	DAY	TIME
Import/Export (.dia)	13	\$250	Wednesday	8:30-1:30 (CST)
Pension System Introduction	14	\$350	Thursday	8:30-4:30 (CST)
Pension System Advanced Topics	15	\$350	Friday	8:30-4:30 (CST)

**\*\*Attend more than one session and save - the more you attend the more you save! \*\***

Join us at our **new** training facility located at the NIU Conference Center in Naperville! See the attached flyer.

\_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_  
 Company Name Contact Phone DATAIR Acct. No.

\_\_\_\_\_ \_\_\_\_\_  
 Contact Name Contact Email

Attendee Name(s):  
 Please Print/Complete Additional Forms if more than two Attendees

	1. _____	2. _____
Import/Export (.dia)	<input type="checkbox"/>	<input type="checkbox"/>
Pension System Introduction (PE1)	<input type="checkbox"/>	<input type="checkbox"/>
Pension System Advanced Topics (PE2)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Both PE days: PE1 &amp; PE2 (Save \$100)</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>All 3 days: PE1/PE2 &amp; .dia (Save \$175)</b>	<input type="checkbox"/>	<input type="checkbox"/>

	# Attendees x Cost	Totals
Import/Export (.dia)	# _____ x \$ 250	\$ _____
Pension System Introduction (PE1)	# _____ x \$ 350	\$ _____
Pension System Advanced Topics (PE2)	# _____ x \$ 350	\$ _____
<b>Both PE days: PE1 &amp; PE2 (Save \$100)</b>	<b># _____ x \$ 600</b>	<b>\$ _____</b>
<b>All 3 days: PE1/PE2 &amp; .dia (Save \$175)</b>	<b># _____ x \$ 775</b>	<b>\$ _____</b>

TOTAL REGISTRATION FEE \$ \_\_\_\_\_

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 <https://datairemployeebenefitsystems.mypaysimple.com/s/payment-on-account-3>

Click on the above link or copy & paste the link into a browser. You will be directed to enter the *Total Registration Fee* in the first field.

Enter your 4 digit DATAIR company acct # in the second field.

Enter **Nov Train** in the Message box

You must still return the Registration Form to complete the process.

**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 14 business days prior to class; cancellations received less than 14 business days will be charged the full registration fee.

**Hotels, Map, and Transportation:** A listing of recommended Hotels and Local Transportation can be found on the DATAIR website <https://www.datair.com/PDF/hotel.pdf>

**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](mailto: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**

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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**

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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](mailto:info@datair.com).

## **EDUCATIONAL CLASSES**

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The following are the current 2019 classes that are presented in person at DATAIR's training facility located at the NIU Conference Center in Naperville

### **NEW! Duck Duck Documents Workshop (December 9)**

This new Documents Workshop is designed to help you work more effectively with the DATAIR document system. Let us help you find ways to make working with documents easy & more organized for wrapping up the required restatements for PPA Defined Benefits, 403(b)s, as well as the upcoming (in late 2020) Post-PPA Defined Contribution restatements. Now is good time to review your procedures and make sure you are making full use of the system features, and to learn about some of the new tools that we are adding to make the whole restatement process less stressful.

This class is designed for anyone that wants to learn to efficiently use the document system with focus on:

- Getting your Ducks in a row and ready for Restatements
- Default Plans, using and applying defaults to new & existing plans
- Mapping from EGTRAA to PPA and Beyond
- Multi-Plan Operations features and functions
- Upcoming Features
- Forms Processing including printing options
- Q & A Session – There will be time for your Q & A, bring questions.\*

Attendees should have a basic knowledge level of documents and should be familiar with the basics of using the system. (\*No legal advice will be provided)

### **NEW! Cash Balance Documents for Defined Benefit Administrators (December 10)**

This new Cash Balance class is designed for coordinating provisions between the Valuation in the PE system and the PPA Cash Balance Document. It will show specifics of both the administration and plan document systems with regards to a Cash Balance plan. There will be a brief discussion on the basics of Cash Balance plans and where the provisions can be found in each system. The main focus will be on the document and not on the calculation of the benefits or funding.

This class is designed for the Defined Benefit administrator and will focus on:

- The Basics of a Cash Balance Plan
- The provisions specific to a Cash Balance plan
- How to coordinate those provisions between the administration and plan document systems
- What provisions you need to pay attention to when pairing a Cash Balance and 401(k) plan

Attendees should have a basic understanding of defined benefit plans and a working knowledge of the plan document system will be needed to attend this class.

### **Pension System Introduction (November 14 or December 9)**

This one day session will cover a detailed review of the system selections and options with a focus on Defined Contribution 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
- Imports/Exports including Census
- Transactions, including shares
- Receivable Elections options
- Non-Discrimination Testing selections, options, and reports
- Reports – options, setting up, and groups
- Employees including Edit Grid
- Death Benefits/Life Insurance

### **Pension System Advanced Topics (November 15 or December 10)**

This session starts where the Pension System Introduction left off and is highly recommended to be taken along with it. 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 Pension System Introduction 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
- DC/DC combined plan testing using Master Plan
- Multi-Plan Operations

### **Import / Export (.dia) (November 13 or December 11)**

This session will cover the aspects of importing and exporting with Pension System. 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

## **CUSTOMIZED SYSTEM TRAINING**

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If you cannot attend on a set date and/or wish to have system training that is tailored to your needs, you can contact DATAIR to set up 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. Customized training is offered based on staff availability.

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

**Webcast:** Your office can arrange customized web training in 1 or 2 hour increments to cover short topics. Our fee for this is billed at \$260 per hour rounded to the next half hour. Minimum of 2 hours will be charged. Limit of 8 hours in a calendar quarter can be scheduled.

**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.

## **DATAIR SYSTEM WEBINARS**

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DATAIR provides 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 as soon as possible, usually 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.



# NOV & DEC 2019 DATAIR TRAINING

## NEW TRAINING LOCATION !

Join us for training at the NIU Conference Center for the 2019 DATAIR System Training Classes. If you have attended the Cash Balance Seminars, it is the same location. The conference center is directly across from the hotels. Convenient from both O'Hare and Midway Airports just off Interstate 88. Enjoy the wonderful Naperville location with easy walk to dining, nearby shopping and even experience IFly. Morton Arboretum is a short ride away as is local shopping in downtown Naperville. Ask for DATAIR staff recommendations! John suggests the World of Beers, Kim says to try Uncle Julios, Christine gives White Chocolate a shout out. Karen prefers to put her feet up at the Hampton.

See the registration form for detailed information on classes and how to save money by registering for multiple classes.

**Register today! Hurry class size is limited!**



## ATTEND SYSTEMS TRAINING

### Location:

NIU Naperville Conference Center  
1120 E. Diehl Rd.  
Naperville, IL 60563 (Suburban  
Chicago)

### Dates: (All times are CST)

#### Pension System Introduction

Nov 14 & Dec 9 8:30 a.m. to 4:30 p.m

#### Pension System Advanced Topics

Nov 15 & Dec 10 8:30 a.m. to 4:30  
p.m

#### Import/Export (.dia) ½ day class

Nov 13 & Dec 11 8:30 a.m. to 1:30  
p.m

#### **NEW!** Duck Duck Documents

Dec 9 8:30 a.m. to 4:30 p.m

#### **NEW!** Cash Balance Documents for

Defined Benefit Administrators

Dec 10 8:30 a.m. to 4:30 p.m

### Included:

Seminar Handouts & Materials  
Continuing Education Certificates  
Lunch and Continental Breakfast  
NIU Guest wifi access  
Power Outlets at every table  
Free Parking

### Hotels:

Hotel, map, and transportation  
information can be found at:  
<https://www.datair.com/PDF/hotel.pdf>  
Mention DATAIR when making  
reservations.

Hampton Inn, Naperville  
(630) 505-1400

Courtyard by Marriott  
(630) 505-0550

Best Western Naperville  
(630) 505-0200

## DATAIR

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630-325-2600

[www.datair.com](http://www.datair.com)