



MAY 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:

Pension System Introduction
May 6 8:30 a.m. to 4:30 p.m

Pension System Advanced Topics
May 7 8:30 a.m. to 4:30 p.m

Import/Export (.dia) ½ day class
May 8 8:30 a.m. to 1:30 p.m

NEW! Cash Balance Documents for
Defined Benefit Administrators
May 20 8:30 a.m. to 4:30 p.m

(All times are CST)

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 on the
DATAIR website
<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

735 N. Cass Avenue
Westmont, IL 60059
630-325-2600

www.datair.com



MAY 2019 DIRECTORY OF EDUCATIONAL SERVICES

SYSTEM	MAY	FEE	DAY	TIME
Pension System Introduction	6	\$375	Monday	8:30-4:30 (CST)
Pension System Advanced Topics	7	\$375	Tuesday	8:30-4:30 (CST)
Import/Export (.dia)	8	\$325	Wednesday	8:30-1:30 (CST)
NEW! Cash Balance Documents for DB Administrators	20	\$400	Monday	8:30-4:30 (CST)

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

I/We would like to attend the following session(s):

Print Attendee name(s) below:	Intro PE/Win \$375	DC/Win \$375	Import/ Export \$325	Cash Balance Documents \$400	
_____	<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 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

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

Pension System Introduction

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

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)

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

NEW! Cash Balance Documents for Defined Benefit Administrators

Cash Balance: Coordinating Provisions between your Valuation and PPA Document
This class, designed for the experienced Defined Benefit administrator, 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

This class will show specifics of both the administration and plan document system with regards to a Cash Balance plan. While there will be a brief discussion on the basics of Cash Balance plans and where the provisions can be found in each system a basic understanding of defined benefit plans and a working knowledge of the plan document system will be needed to attend this class.

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 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.

The following classes are some of the additional available sessions:

403(b) Documents to Administration

A one-day course that covers completing your 403(b) document for PPA restatement. Once your document is restated, are all of your items entered properly in the pension system. Which reports and tests should you be looking at in the system. Working knowledge from using the system or the Pension System Introduction class is required for this session.

Defined Benefit Advanced Topics

An intensive one-day course that covers all options in the system. 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 Pension System Introduction class is required for this session

Report Writer

This session for Report Writer will cover topics including how to modify current reports for the Pension System 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.

DATAIR SYSTEM WEBINARS

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.