This document provides an overview of the required and recommended training and information available to help you learn how to use UltiPro in your role as Benefits Administrator.

All learning and reference information can be accessed and viewed from the Learning Center. Reference information available in the Learning Center includes Quick Tours, recorded webcasts, job aids, checklists, guides, and release notes. You can access the Learning Center from the Customer Success Portal.

From the Learning Center, you can view course information and register for training by navigating to the UltiUniversity page, then choose to Access UltiUniversity.

We hope you will find this plan useful in coordinating the training needs of your team.

### Recommended skill set:

We recommended that participants have experience with the following basic skill set:

- Understanding your organization's benefit plans and programs
- Understanding your organization's UltiPro data
- Prior experience with report writing applications

### To prepare for the Plan Phase, complete the following:

This project phase is designed to introduce all project team members to the project and its scope. To prepare for this phase, complete the following.

**Required**

- 051f Introduction to UltiPro (2.5 hours)
- Welcome to UltiUniversity (10 minutes)

### To prepare for the Prototype Phase, complete the following:

This phase is designed to profile your configuration through review of existing reports, analyze requirements to develop a solution design, and configure the solution. This phase also provides unit testing to ensure that each iteration delivers a fully configured component of the system. To prepare for this phase, complete the following.

**Required**

- 052f Manage Employee Information (3.0 hours)
- 084 Deduction and Benefit Business Rules Configuration ( hours)

### To prepare for the Validate Phase, complete the following:

This phase is designed to provide comprehensive testing for all components that will be deployed on first live date. At this time, additional training is not required.
To prepare for the Deploy Phase, complete the following:

This phase is designed to finalize configuration and data in order to execute a first live payroll process. At this time, additional training is not required.

To prepare for the Optimize Phase, complete the following:

During the Optimize phase, other products and services are deployed. To prepare for this phase, complete the following. It is recommended that during this phase, the Benefits Administrator activates Life Events.

Required

- 128 Life Events Configuration (2 hours)

To prepare for Open Enrollment activation, complete the following:

Typically, Open Enrollment activation begins eight weeks prior to the next benefits open enrollment period. Configuration of employee personal and benefit information should be validated prior to activating Open Enrollment.

Required

- 129 Open Enrollment Session Configuration and Troubleshooting (3 hours)

Note: User communities are a great way to exchange ideas by sharing your knowledge with others and getting answers to questions. To learn more about the UltiPro User Communities (UUC) or to join those of interest to you, visit the Customer Success Portal Home page and select User Communities.

Want More? Additional content is available in the Learning Center, including Quick Tours, Quick Tips, and Guides.