PlanSource Monthly Training Dates

Learn the ins and outs of utilizing PlanSource as your benefits platform. All trainings are held at 11 a.m. EST.



True invites with meeting links will be sent out by PlanSource.



2025 Trainings:

January - System Overview

February 13 - Best Practices on Life Events, Reports, & Invoicing

March 13 - Overage Dependent Reports

June 12 - COBRA, Retiree / birth life events, and overage dependents

July 10 - System
Overview

August 14

September 10 - Summit

October 9

November 13

December 11

Click the date of any previous session(s) to rewatch the training recording.

Click here to add a calendar hold for each training

Or scan the QR code:



