



Maxwell Health Learning Plan

Level 1 - Maxwell Basics		Maxwell Health		Week 1	
1- 5 Days Prior to Maxwell Access			1st Day Accessing Portal		
30 min	Getting Started with Maxwell	>> Training	10 min	Add Test Employee	>> Exercise
2 min	Member Shopping Experience	>> Video	10 min	Review Checklist	>> Article
			5 min	Set up Notifications	>> Article
Additional Recommended Learning:					
5 min	Lifestyle Product Overview	>> Article	5 min	Setup your Payroll Calendar	>> Article
			2 min	Sending out Welcome Emails	>> Video
Level 2 - Managing Employee Information		Week 2-3			
Upon First New Hire			Upon a Qualifying Event or Termination		
30 min	New Hire Enrollments	>> Training	2 min	Life Events in Maxwell	>> Video
2 min	Approving an Employee's Elections	>> Video	2 min	Terminate an Employee	>> Video
1 min	Updating Employee Profile Information	>> Video	5 min	Managing COBRA Events	>> Article
Additional Recommended Learning:					
2 min	Add a New Hire	>> Video	5 min	Qualifying Event Changes	>> Article
3 min	Approve or Deny Elections Pending EOI	>> Video	2 min	Correcting Employee Benefit Enrollments	>> Video
3 min	Carrier Connections in Maxwell (EDI)	>> Video			
Level 3 - Managing Open Enrollment*		*Please Note, the below track is recommended to start upon renewal or closer to your Open Enrollment			
2-5 Days Prior to Open Enrollment			1-3 Days after Enrollment Ends		
30 min	Run Open Enrollment in Maxwell	>> Training	5 min	End and Close Open Enrollment	>> Article
3 min	Set up & Kick off OE	>> Video	5 min	Submit Employee Elections to Carriers	>> Article
Additional Recommended Learning:					
5 min	Guide to Open Enrollment in Maxwell	>> Article	2 min	Correcting Employee Benefit Enrollments	>> Video
5 min	EDI Renewal Process	>> Article	2 min	Approve or Deny Additional Volumes for EOI	>> Article
5 min	Handling New Hires or Changes During OE	>> Article			
5 min	Set up forms to Send Automatically	>> Article			
Level 4 - Maxwell Tool Kit		Week 3-4			
Information to Review			Prior to Payroll Run		
30 min	Focus on Forms	>> Training	5 min	View Payroll Changes	>> Article
5 min	About Documents	>> Article	5 min	Map Payroll Deduction Codes	>> Article
30 min	Run Reports in Maxwell	>> Training			
Additional Recommended Learning:					
5 min	Integrations with Maxwell	>> Article	5 min	Supported Payroll Connections	>> Article
5 min	Carrier Connections with Maxwell (EDI)	>> Article			
2 min	Customizing a Report	>> Video			