

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
2 min	Member Shopping Experience	>> Video	10 min Review Checklist
			5 min Set up Notifications
Additional Recommended Learning:			
5 min	Lifestyle Product Overview	>> Article	5 min Setup your Payroll Calendar
			2 min Sending out Welcome Emails
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
2 min	Approving an Employee's Elections	>> Video	2 min Terminate an Employee
1 min	Updating Employee Profile Information	>> Video	5 min Managing COBRA Events
Additional Recommended Learning:			
2 min	Add a New Hire	>> Video	5 min Qualifying Event Changes
3 min	Approve or Deny Elections Pending EOI	>> Video	2 min Correcting Employee Benefit Enrollments
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
3 min	Set up & Kick off OE	>> Video	5 min Submit Employee Elections to Carriers
Additional Recommended Learning:			
5 min	Guide to Open Enrollment in Maxwell	>> Article	2 min Correcting Employee Benefit Enrollments
5 min	EDI Renewal Process	>> Article	2 min Approve or Deny Additional Volumes for EOI
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
5 min	About Documents	>> Article	5 min Map Payroll Deduction Codes
30 min	Run Reports in Maxwell	>> Training	
Additional Recommended Learning:			
5 min	Integrations with Maxwell	>> Article	5 min Supported Payroll Connections
5 min	Carrier Connections with Maxwell (EDI)	>> Article	
2 min	Customizing a Report	>> Video	