StoneRiver Training

Education Opportunities

High performance software is a requirement for business success—the other essential element is knowledge. With this in mind, StoneRiver offers a range of informative courses for new and existing users.

You will find courses on NAIC updates, in addition to user training for each StoneRiver system.

CPE Credits can be earned for any training course in this catalog. Please review registration details on page 7 as you prepare to register.

Web-based Training

All of the StoneRiver training courses are available from the convenience of your desktop. If you have an Internet connection and a phone, you're ready to take advantage of remote learning. Benefits:

- Lower tuition
- Multiple attendees
- No travel expense
- Less workload backlog

You may connect to a web-based training from a conference room and use a speaker phone to train your entire group.[1] There is one charge per log-in, and no limit to the number of people who can attend.

Quality Instruction

StoneRiver Web-based training courses are live events with two-way dialog that facilitate interaction and clarification. Our instructors are subject matter experts who can answer your questions and provide background information. You'll be able to apply your new knowledge immediately.

Custom Training

StoneRiver product experts can tailor training content for your specific business needs. We'll bring customized training to your office, or tailor Web-based instruction to meet your organization's specific requirements.

Call us today at 800-373-3366 ext. 5716.

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[1] *Note: A separate log-in is required for each person earning CPE credit to verify attendance for NASBA.*

StoneRiver 2019 Course Schedule

Annual Statement

PRO and PTE Financial

Additional Training Information

eFreedom Software Update

This is a group internet-based training event. If you want to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

Objective

Basic level course designed to provide users with news about new eFreedom software features, product support tools, and general software information. See the latest eFreedom enhancements as well as tips and tricks for preparing the statement within the StoneRiver software.

Agenda

- Annual Statement Client Services & Support
  We will describe the full range of Annual Statement support resources available to you. You will learn the most efficient way to access customer service, and how to subscribe to email notifications for State Checklist Direct and our NAIC Focus newsletter.

- Software Enhancements
  An overview of the latest software enhancements will be provided. You will learn the benefits of the new enhancements and how they will help you complete the filings more efficiently.

- Tips and Tricks
  You will learn about features that simplify your statement preparation, and new ways to streamline the process. These tips and tricks shave time and effort off your quarterly and annual filings. You will understand how the features discussed can help in your workflow.

Intended Audience

The seminar is intended for experienced regulatory software users. No prerequisites are required. Advance Preparation: None.

Estimated CPE Credit

1.5 credit hours

Tuition

$200

If combined with NAIC Update, total fee: $450

Dates and Times

Tuesday, November 19

Thursday, November 21

1:00 p.m. – 2:30 p.m. Central Time

NAIC Update and Blank Changes
Health, Life or P&C

This is a group internet-based training event. Separate sessions are offered for LAH, Property & Casualty and Health insurers. If you want to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

Objective

Basic level course designed to provide participants with the most recent accounting and reporting information regarding changes adopted by the National Association of Insurance Commissioners (NAIC) for year-end 2019 reporting.

Agenda

- Annual Statement Reporting
- Risk-Based Capital
- Accounting Update
- Year-end Pending Issues
- On-going NAIC Activities

Intended Audience

Personnel responsible for filing statutory statements and associated reports. No advanced preparation is required. A basic understanding of statutory accounting and reporting is helpful, but not required. Advance Preparation: None.

Estimated CPE Credit

3 credit hours

Tuition

$375

If combined with eFreedom Update, total fee: $450

Dates and Times

P&C Blank Changes: Tuesday, December 3

Health Blank Changes: Wednesday, December 4

Life (LAH) Blank Changes: Thursday, December 5

1:00 p.m. – 3:30 p.m. Central Time

PRO Financial 1099 Processing

This is a group internet-based training event. If you want to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

Objective

Basic level course to learn to develop or enhance a working knowledge of generating 1099 data for export using PRO Financial.

Agenda

- Explain the process of setting up and preparing Federal Reporting information using Export functionality in the PRO Financial Accounts Payable module.

- Step-by-step instructions on how to set up vendors as 1099 vendors and create the 1099 business rules for data export.

- Learn how to maintain the 1099 maps within PRO to export to outside federal reporting applications (examples: StoneRiver PTE Federal Reporting System, Convey Compliance).

Intended Audience

Personnel responsible for generating 1099s for their company. No prerequisites, basic understanding of PRO Financial required. Advance Preparation: None.

Estimated CPE Credit

1.5 credit hours

Tuition

$200

Dates and Times

Wednesday, January 9

Wednesday, December 11

1:00 p.m. – 2:30 p.m. Central Time

PTE Financial Federal Reporting and 1099 Processing

This is a group internet-based training event. If you want to earn CPE credit, NASBA requires an individual registration and internet connection for each participant.

Objective

Basic level course to learn to develop or enhance a working knowledge of generating 1099s using PTE Federal Reporting module.

Agenda

- Imports into Federal Reporting (from other PTE modules and/or ASCII file)
- 1099 Maintenance (Add, Delete, Change)
- Reports
- 1099 Printing (Original and Corrected Returns)
- Filing with the IRS

Intended Audience

Personnel responsible for generating 1099s for their company. No prerequisites, basic understanding of PTE required. Advance Preparation: None.

Estimated CPE Credit

1.5 credit hours

Tuition

$200

Dates and Times

Tuesday, January 8

Tuesday, December 17

1:00 p.m. – 2:30 p.m. Central Time

Important Registration and Refund Information

Please register at least ten business days prior to your preferred course.

1. Register online at http://www.stoneriver.com/financial-compliance-training.
2. A valid email address is very important. A confirmation email will be sent to all registrants.
3. StoneRiver reserves the right to cancel a course if the number of registrants does not meet our minimum class size. Sufficient notice will be provided to all affected registrants and all tuition will be refunded if alternate dates cannot be selected.
4. If you cancel your registration and request a replacement course, your tuition will be applied to your replacement if we are notified of the change.
5. Cancellations received up to ten business days prior to the course start date are refundable. All others are subject to the entire course fee. Substitutions may be made at any time. Please note that if you do not cancel and do not attend, you are still responsible for payment.
6. Individual registrations are required for CPE credits.
7. The person logged into the webinar will be the only participant eligible for CPE credits. If CPE credits are not required for additional participants, you may have an unlimited number of participants per connection in your office.
8. For more information regarding administrative policies, refunds, or complaints, please call 800-373-3366, ext. 5716.

Continuing Education Credit

StoneRiver provides CPE credit because we understand that continuing education is important to you. Sponsored learning activities are measured by program length, with one 50-minute period equal to one CPE credit. One-half CPE credit increments (equal to 25 minutes) are permitted after the first credit has been earned in a given learning activity. Please refer to individual course listings to find specific CPE credit hours. Certificates of completion are given at the conclusion of each course.

StoneRiver is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

StoneRiver Lifeline

StoneRiver Lifeline, our Web-based customer support service, saves you time by providing easy access to product files, current industry information, and support personnel. Log on to Lifeline and automatically search a Frequently Asked Questions (FAQ) database, post specific questions for product support to resolve, upload and download product files, update your user profile and company data, and much more.

How can I register for Lifeline?

Simply go to http://lifeline.stoneriver.com and complete the online form. You will receive a User ID and password via e-mail, with instructions on entering the site.

NAIC Focus

NAIC Focus is an online forum that keeps you in closer touch with current NAIC issues. Connie Jasper Woodroof, our Liaison to the NAIC, uses this forum to share information and insight into regulatory reporting requirements, electronic filing directives, instructions, and the latest NAIC hot topics. Subscribe to the NAIC Focus at http://www.stoneriver.com/naic and receive an automatic email notification each time a new column is posted.