RELIUS DOCUMENTS

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Retirement Solutions | Plan Documents

Overview

FIS' Relius Documents serves as your comprehensive, full-service document generation system for retirement plans, cafeteria plans and self-funded health plans. With Relius Documents, you can produce IRS-compliant plan documents and supporting forms packages, including Adoption Agreements and Summary Plan Descriptions, drafted by Relius' nationally recognized employee benefits attorneys, who continually update the document language to comply with industry legislation and trends.

Relius Documents can help you produce standardized, non-standardized, and individually designed defined contribution and defined benefit documents to suit your specific plan design needs. Complete supporting forms packages include Adoption Agreements, Summary Plan Descriptions enrollment forms, beneficiary designations, and other administrative forms.

Current document sets offered by FIS and available on Relius Documents include: defined contribution, defined benefit, ESOP, 403(b) 457(b), and cafeteria plans. The Relius Documents system allows you to efficiently process as many plans as you need. The resource is completely scalable and is an FIS hosted software application. FIS offers several add on modules to the core system to help you maximize productivity and efficiency.

As a hosted application, Relius Documents helps save you the time normally spent on installing software and performing updates. It helps reduce costs involved in maintaining and updating hardware. FIS performs system back-up services and provides operational redundancy for business continuity, helping to ensure your information is both accessible and safe. Relius Documents affords your business the flexibility and scalability to meet your plan document needs.

Key Software Features and Benefits

- Plan documents written by industry-known consultants and attorneys

- Pre-approved plan documents to lower IRS user fees and plan implementation costs

- Saves time involved in researching and drafting plan documentation

- Includes Summary Plan Descriptions and forms that coordinate with the plan

- Secure systems with operational redundancy to help ensure business continuity

- Validation logic invoked during the document generation process to mitigate errors

- Ability to produce several different plan documents through various delivery methods

- Links to Relius Administration and Relius Government Forms

Additional Offerings

- **Relius Connect for Documents:** Enables efficient automated plan document generation via web services/APIs. Use a web-based front end or any other application to automatically exchange data between Relius Documents and your proprietary systems, or request documents for delivery via email – all without ever logging into your Relius Documents system. If you do not have access to programming resources, FIS can help you to develop a customized and automated data collection/document generation solution.

- **Checklist Entry:** A browser-based application, packed with features to help make your data entry process more efficient. Features include easy navigation that highlights unanswered questions, "unanswered questions only" checklist print option, copy and paste functionality, validation logic, and detailed explanations regarding disabled questions or responses.

- **Document Editor:** Allows users to customize documents with special language, formatting changes, or custom images and save the edits to the Relius Documents system for future rebuilds of the same document. This feature allows edits to be saved for one plan or to a library where they can be applied to any number of plans.

- **File Cabinet:** Provides a file storage feature built into Relius Documents. This module allows users with appropriate rights to set up folder structures, save copies of files, or upload files to the Relius Document system. The File Cabinet provides a useful repository to track and safely maintain copies of produced plan documents and forms

- **Relius Exchange:** Allows you to disseminate various plan document materials such as documents or interactive questionnaires to specified managed contacts via a secure website branded with your company's logos. The module includes approved electronic signature functionality so that assigned users can execute plan documents and related forms. Relius Exchange can serve as a tool for providing end users with secure access to published plan documents and amendments, or questionnaires to assist with plan document preparation.

- **Employer Requested Amendment Processing:** This module allows you to change any plan election automatically, either immediately or upon the assignment of a certain status (i.e., client signed). Choose any combination of documents to include in the amendment package, such as the plan amendment, summary of material modifications, adopting resolution, cover letter, and/or a completely new adoption agreement or summary plan description (SPD).

- **Multi-doc Processing:** This module allows you to batch create or validate multiple plan document packages at one time. Plans that require an annual participant notices, such as safe harbor, EACA, QACA, or SIMPLE, can be identified quickly. Customized annual notices can be generated for each of the plans in the batch. Couple this module with the reporting features, and you can batch process documents based on the results of queries you create.

- **Project Archive and Restore:** This module allows for the archival of the terminated or outdated plans you may have cluttering up your system, but which you do not want to delete entirely. The archive feature allows you to remove projects from view throughout your system, with the option to easily restore them at any time if necessary.

For more information

For more information about FIS' Relius Plan
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