

SunGard's Relius Documents ASP (continued)

Enhancement Modules:

Multi-Doc Processing

Create your safe-harbor and auto deferral notices in batch mode. Query all of your project data for safe harbor, non-safe harbor, and auto deferral plans and produce employer-specific notice packages for any number of plans in the query result. This feature also gives you the ability to validate your plan checklists and/or generate your plan document packages in batch mode.

Reporting

Run reports on **any** provisions that you select in your checklist. Just specify the start date and document type. Select the checklist or Adoption Agreement provisions you want to query and submit. Your report is available within minutes for viewing and exporting in a Microsoft Excel, CSV, or XML file format. All report queries are saved for modifying or running again at a later date.

Short Amendment

There are several amendment types offered through our Short Amendment Module including:

- Regulatory Amendments – IRS or DOL required amendments written by our nationally known employee benefit attorneys. Create personalized amendment packages for one or many plans, and automatically update those plans with the provisions selected.
- SunGard Designed Amendments – Create employer requested amendments for the most commonly amended plan provisions.
- Self-Designed Amendments – Create amendments that you customize by modifying any section of the plan. By entering the section number and corresponding information, you choose how to design the amendment.

All Short Amendment packages include submission forms, summary of material modifications, and tax forms, if applicable, and are designed to link back to your original document for easy reference and tracking.

Data Export

Link your Relius Documents data to other SunGard Relius products through Data Export. You can export or “push” your project data in an XML format to Relius Administration or Relius Government Forms, as well as to other systems that are compatible with XML. The transferred data can then be posted to the FTP site of your choice in a .zip or .exe compressed file.

Data Import

Import XML data that has been exported from Relius Administration or collected via an external application into Relius Documents ASP. The imported data can be used to set up a new plan or update current specifications in an existing plan.