

Web Client 2014 – Preparer Login

Overview

A new appearance and new features have been implemented for preparers in Web Client 2014.0. As we continue to develop RGF Web and migrate functionality from the Desktop 5500 application, new features and functionality will be made available in Web Client. This document goes over the new features available to preparers.

The screenshot shows the login interface for the SunGard Relius Government Forms Web Client. At the top, there is a header with the SunGard logo and the text "RELIUS GOVERNMENT FORMS". Below the header is a login form with two input fields: "User Name" and "Password". To the right of the "Password" field is a "Log In" button and a link for "Forgot Password?". Below the login form is a large blue box containing the following text:

Web Client is a collaboration tool for the completion of the 5500 and other related forms.

- ✓ Secure e-delivery of your documents
- ✓ Easy collaboration with your service provider
- ✓ EFAST2 Certified
- ✓ Electronic Filing Enabled

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Figure 1

Updated 1/3/2014

Plan Dashboard

When the preparer logs in to Web Client, they will be directed to the new Plan Dashboard screen. The Plan Dashboard screen includes Find Plan, Alerts and Messages, Recent Plans, Links and Quick Access.

Welcome Maria Houmard (edit) Log Out ? (Print Queue)

SUNGARD RELIUS GOVERNMENT FORMS

Plan Management Organizational Management User Profile Help

Plan Dashboard

Find Plan

My Plans All Organization Plans

2013 Plan Name Search Criteria Search

Create New Plan Plan List Org Settings Manage Clients

Alerts and Messages [View All Messages](#)

Sungard Relius First Message Test 11/18/2013

Sungard Relius Second Message Test 11/11/2013

Recent Plans

Plan Name	EIN	PN	Plan ID	PY	FY
MKH 2013 Default	458883334	001	MKH Def...	2013	2013
5500 Test Plan	459911111	001	DFE	2012	2012
5500 Test Plan	459911111	002	8955	2012	2012

Links

[Product News](#)

[General FAQa](#)

[Fixes and Updates](#)

[Pending Issues](#)

[Web Client On Demand Plan Planbook Purchase](#)

[IRS Info](#)

Quick Access

My Plans All Organization Plans

View plan metrics for form year: 2013

Plans not yet accepted and within 10 days of deadline 0

Plans in Preparation

Not Published	0
Published	1
Total Plans	1

Purchased Plans

Purchased	50
Used	1
Remaining	49

EFAST Filings

Plans without 5500/5500-SF	0
Not Filed	0
In Processing	0
Accepted	0

Plans with EFAST Status

Filing Received	0
Processing Stopped	0
Filing Error	0
Filing Unprocessable	0
Submission Failed	0

FIRE Filings

Plans without 8955-SSA	1
Not Filed	0
In Processing	0

Plans with FIRE Status

Filed	0
Submission Failed	0

Figure 2

Find Plan – Allows the preparer to search for their plans or all organization plans. The user can choose to search by Plan Name, EIN, Plan Number, Plan ID, or Plan Year and what Form Year to search for.

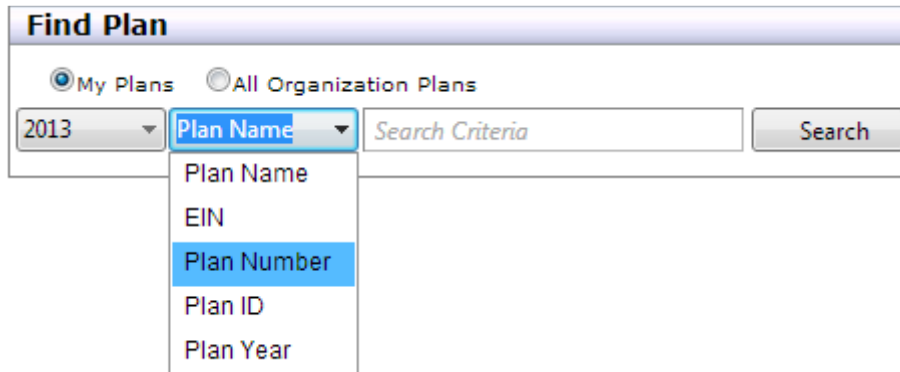


Figure 3

Icons – Also included on the Dashboard, are icons that allow the preparer to Create New Plan, View Plan List, go to Organization Settings and go to Manage Clients.



Figure 4

Alerts and Messages – Allows the preparer to view any alerts or messages that will be released by SunGard Relius. This information will include messages such as when Web Client will be down, if EFAST or IRS FIRE system is down, etc.

Recent Plans – Will list the five most recent plans accessed by the preparer. In this list, it will include the Plan Name, EIN, Plan Number, Plan ID, Plan Year and Form Year. The plan names are links that the user can select and be directed to the Plan Summary page.

Links – Will display useful links for the preparer such as Product News, General FAQs, Fixes and Updates, Pending Issues, Web Client On Demand Plan Planbook Purchase and IRS Info.

Quick Access – Provides metrics on the plan inventory and status. The preparer will be able to quickly identify how many plans are in the status of Preparation, Purchased Plans, EFAST Filings, Plan with EFAST Status, FIRE Filings and Plan with FIRE Status. The user can view this listing for only their plans or all plans in the organization. In addition, the user can select what form year to view.

If the preparer would like to see a list of the plans in a particular status, the user can select the link of the status and a list of only the plans in that status will be displayed (see Figure 5).

Plans Used

My Plans
 All Organization Plans

View plans for form year: 2013

Page size: 10 | 1 items in 1 pages

<input type="checkbox"/>	Plan Name	EIN	Plan #	Plan ID	Plan Year	Form Set Status	EFAST Filing Status	8955-SSA Filing Status	Publisher
<input checked="" type="checkbox"/>	MKH 2013 Default	458883334	001	MKH Default	2013	Published	Retrieved	N/A	Maria.Houmard

Action to perform on selected plans: Print | Go

Figure 5

Plan List

The Plan List page will display the list of plans for just that preparer or all organization plans. The user can choose what form year to view. The list contains information for Plan Name, EIN, Plan #, Plan ID, Plan Year, Form Set Status, EFAST Filing Status, 8955-SSA Filing Status and the Publisher's name. On this page, the preparer can choose plan(s) that they want to Print, Disable Edit & Filing (Complete), View Status History, Re-send Client Invitation, E-FILE 5500 or 8955, Enable Filing for 5500 or 8955 and Clear Signatures. The user will be able to click on the Plan Name to go to the Plan Summary page for that plan.

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SUNGARD RELIUS GOVERNMENT FORMS

Plan Management Organizational Management User Profile Help

Plans Reassign Plans Manage Clients Manage Preparers Printing

Plan List

My Plans All Organization Plans

View plans for form year: 2013

Page size: 5 1 items in 1 pages

<input type="checkbox"/>	Plan Name	EIN	Plan #	Plan ID	Plan Year	Form Set Status	EFAST Filing Status	8955-SSA Filing Status	Publisher
<input checked="" type="checkbox"/>	MKH 2013 Default	458883334	001	MKH Default	2013	Published	Retrieved	N/A	Maria.Houmard

Action to perform on selected plans: **Print** Go

- Print
- Disable Edit & Filing (Completed)
- Delete Plan(s)
- View Status History
- Re-send Client Invitation
- E-FILE(5500)
- E-FILE(SSA)
- Enable Filing(5500)
- Enable Filing(SSA)
- Clear Signatures

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Figure 6

Create New Plan

The Create New Plan feature is new with Web Client 2014, and will allow the preparer to add a new plan directly on Web Client. NOTE: This is only available for 2013 form years and later. To create a new plan, the user must select the Create New Plan icon shown below in Figure 7 on the Plan Dashboard screen.



Figure 7

The user will then be presented with the screen below in Figure 8, and will need to complete the required information for the plan, such as Plan Name, Plan Year Begin and End date, EIN, Plan Number, and Alternate PlanID (optional) and then select Create Plan.

Figure 8 is a screenshot of the 'Create a New Plan' form. The top navigation bar includes 'SUNGARD', 'RELIUS GOVERNMENT FORMS', and user information: 'Welcome Maria Houmard (edit) Log Out ? (Print Queue)'. Below the navigation are tabs for 'Plan Management', 'Organizational Management', 'User Profile', and 'Help'. The main form area is titled 'Create a New Plan' and contains the following fields:

- Plan Name: * Test Plan Name
- Plan Year Begin Date: * 1/1/2013
- Plan Year End Date: * 12/31/2013
- EIN: * 45-1111111
- Plan Number: * 001
- Alternate PlanID: Test

At the bottom of the form, there is a message: 'This plan will be created on 2013 forms. Your organization has 49 purchased plans remaining. Click [here](#) to order additional plans.' Below this message is a red note: '* Fields denoted with an asterisk are required.' At the bottom right are 'Create Plan' and 'Cancel' buttons.

Figure 8

After the preparer selects Create Plan, the Plan Information Worksheet will open so that the user can fill out the rest of the Plan Information entries. The basic information that the Preparer entered to create the plan will automatically be filled in the form. As the user is working in the form, the form will be saved automatically. When the user is done, they will go to Form > Close Form. When the user closes the form, they will be directed to the Plan Summary Page.

Welcome Maria Houmard (edit) Log Out (Print Queue)
Last Saved: 11:03 AM

Plan Sponsor's Information
 Plan Sponsor's Care Of Name
 Plan Sponsor's Location City, Province, State and ZIP
 Plan Sponsor's EIN: 45-1111111
 Plan Sponsor's Phone Number

Plan Administrator Information
 Same as Plan Sponsor Name Same as Plan Sponsor Address
 Plan Administrator's Name Plan Administrator's Address Foreign
 Plan Administrator's Care Of Name Plan Administrator's City, Province, State and ZIP
 Plan Administrator's EIN Plan Administrator's Phone Number

Plan Information
 Plan Name: Test Plan Name Business Code
 Filing for Plan Year: [] DFE Plan
 Plan Year Begins: 01/01/2013 Ends: 12/31/2013
 Abbreviated Plan Name Tax Year Begins: [] Ends: []
 Three-digit Plan Number: 001 Plan ID: Test Name Control: []

Figure 9

Plan Summary

The Plan Summary page will display the basic information about the plan, such as Plan Name, EIN, Plan #, Plan ID, Plan Year End, Form Year, and Plan Year. It will also include the Form and Filing Status for the plan.

The Plan Summary page will serve as the processing hub for the selected plan. On this page the user will find options to Prepare Plan, Publish and E-file. This page will also display the Forms in the plan, and allow the user to quickly add new forms. On the bottom of the screen, the Invited Clients will display, and the user will have the ability to add new clients.

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SUNGARD RELIUS GOVERNMENT FORMS

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Plan Summary Test Plan Name

EIN: 45-1111111 Plan #: 001 Plan ID: Test Plan Year End: 12/31/2013 Form Year: 2013 Plan Year: 2013

Form Statuses:

Filing Status		Prepare Plan		Forms in Plan	
Form Status:	Unpublished	Plan Information Worksheet Manage Forms & Attachments Print Plan Reassign Plan Delete Plan Status History		Add new form	
Filing Status:	None	Publish E-File			

Invited Clients

<input type="checkbox"/>	Username	Email	First Name	Last Name	Role	Client's Status
<input type="checkbox"/>	mariahoumard3	maria.houmard@gmail.com	Maria	Houmard	Select role...	Unpublished

Add Remove Close

Figure 10

Filing Status – Will display the Form Status, EFAST Filing Status as well as the 8955 Filing Status. The Filing Status will also include when the filing is due and if the form has a 5558 extension included in it or not.

Filing Status	
Form Status:	Locked by Administrator
EFAST Filing Status:	Retrieved
EFAST Filing due:	7/31/2014
5558 included:	No

Figure 11

Prepare Plan – Provides the user the ability to open the Plan Information Worksheet, Manage Forms & Attachments (adding, editing, viewing), Print Plan, Reassign Plan, Delete Plan, and view Status History.

Prepare Plan
Plan Information Worksheet
Manage Forms & Attachments
Print Plan
Reassign Plan
Delete Plan
Status History

Figure 12

When the user selects **Manage Forms & Attachments** (see Figure 13), the user will be able to print the forms/attachments, create a new form/attachment, delete the forms/attachments and edit/view a form/attachment. The form types are links which allow the user to view/edit the form. The attachment descriptions are links that allow the user to open the attachment.

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SUNGARD RELIUS GOVERNMENT FORMS

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Forms & Attachments MKH 2013 Default

EIN: 45-8883334 Plan #: 001 Plan ID: MKH Default Plan Year End: 12/31/2013 Form Year: 2013 Plan Year: 2013

Form Statuses: EFAST2: Unpublished

Forms

Select	Form Type	Name	Plan Year		Published
<input type="checkbox"/>	5500		2013		No
<input type="checkbox"/>	5500 Sch. A	Sch A1	2013		No
<input type="checkbox"/>	5500 Sch. C		2013		No
<input type="checkbox"/>	5500 Sch. G		2013		No
<input type="checkbox"/>	5500 Sch. H		2013		No
<input type="checkbox"/>	5500 Sch. R		2013		No

Print New Delete

Click on Form Type to open form

Attachments

Select	Description	Type	E-File	Form	Name	Item	Size
<input type="checkbox"/>	Accountants Opinion	EFAST	Yes	5500 Sch. H		Part III	0.1
<input type="checkbox"/>	Schedule of Assets (Held at End of Year)	EFAST	Yes	5500 Sch. H		Line 4i	0.1

New Update Delete

Click on Description to open attachment

Close

Figure 13

Publish – Provides the user the ability to Publish Plan to Clients, Unpublish Plan, Send Notifications and Disable Edit & Filing (Completed).

Publish

- [Publish Plan to Clients](#)
- [Unpublish Plan](#)
- [Send Notifications](#)
- [Disable Edit & Filing \(Completed\)](#)

Figure 14

When the preparer selects **Publish Plan to Clients**, they will be able to choose which client(s) they want the plan to be published to and which client will receive the client invitation email (see Figure 15). This is a new feature that will allow the user to select to only publish the plan and not send the client invitation email, or select to both publish the plan and send the client invitation email. In addition, the user will be able to select the publishing options, such as enable filing, enable editing and authenticating new clients.

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SUNGARD RELIUS GOVERNMENT FORMS

Plan Management Organizational Management User Profile Help

Plans Reassign Plans Manage Clients Manage Preparers Printing ▾

Publish Plan MKH 2013 Default

EIN: 45-8883334 Plan #: 001 Plan ID: MKH Default Plan Year End: 12/31/2013 Form Year: 2013 Plan Year: 2013

Form Statuses: EFAST2: Unpublished

1. Select to Publish and Notify

Publish	Send Notification	Email	First Name	Last Name	Role	Client's Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	maria.janco@relius.net	Maria	Janco	Plan Administrator	Unpublished
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	maria.janco@sungard.com	Maria	Janco	Plan Sponsor	Unpublished

2. Select Publishing Options

Form Editing

Allow Clients to change the entries in the forms?

Yes
 No
 Use setting selected in forms

Options

Other options

Authenticate new Clients when publishing

EFAST 5500 Filing

Allow Clients to file the 5500 forms to EFAST?

Yes
 No

Form 8955-SSA Filing

Allow Clients to file form 8955-SSA?

Yes
 No

Publish Cancel

Figure 15

When the preparer selects **Unpublish Plan**, they will be able to choose which client(s) they want the plan to be unpublished for (see Figure 16).

Welcome Warren Jennings (edit) Log Out ? (Print Queue)

SUNGARD RELIUS GOVERNMENT FORMS

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Plans Reassign Plans Manage Clients Manage Preparers Printing

Unpublish Plan SunGard Savings & Loan

EIN: 59-8888800 Plan #: 123 Plan Year End: 12/31/2013 Form Year: 2013 Plan Year: 2013

Form Statuses:

Select Clients to Unpublish

Unpublish	Email	First Name	Last Name	Role	Client's Status
<input type="checkbox"/>	warren.jennings@sungard.com	Warren	Jennings	Plan Sponsor	Published

Unpublish Cancel

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Figure 16

When the preparer selects **Send Notifications**, the user can select the client(s) to send the notification to, and which notification to send; the user can select to send the Client Invitation email, or the Client Invitation Republish email.

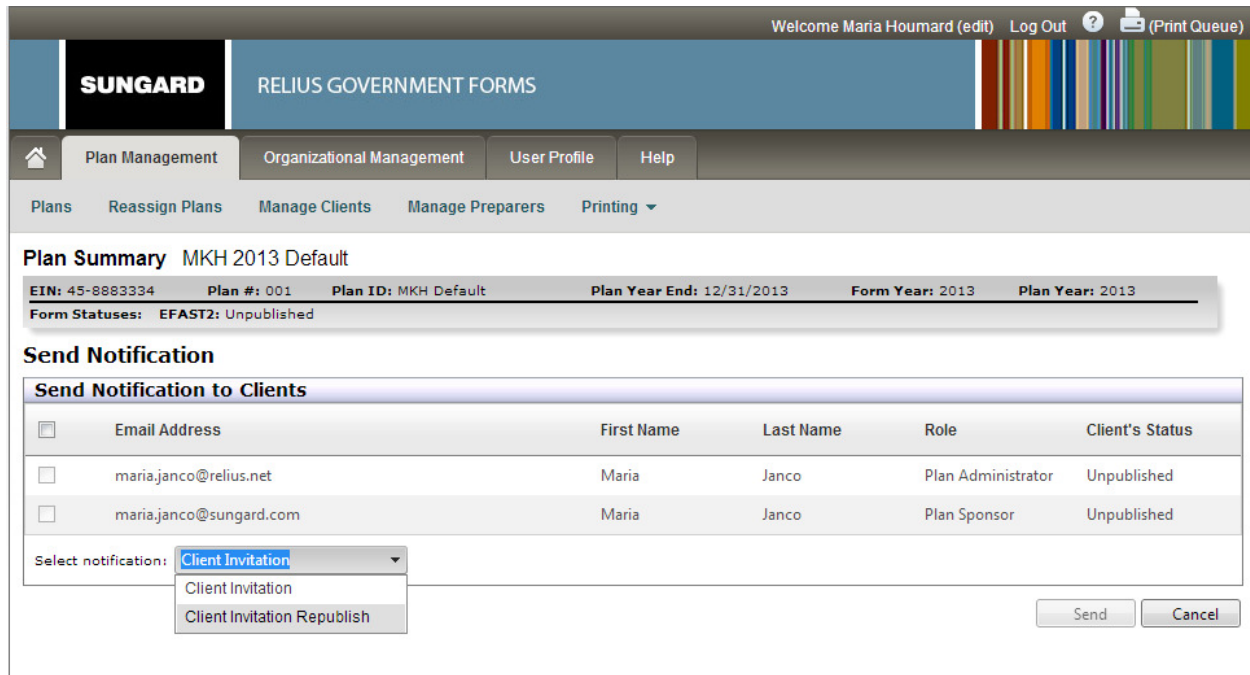


Figure 17

E-File – Allows the preparer to electronically file the 5500 or the 8955-SSA.

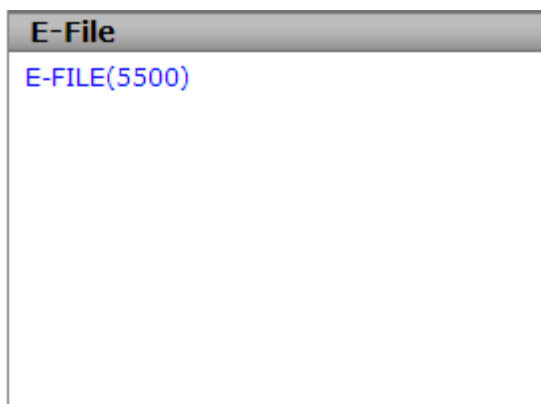


Figure 18

Forms in Plan – Allows the preparer to quickly view/edit existing forms and schedules included in the plan, or Add a new form.

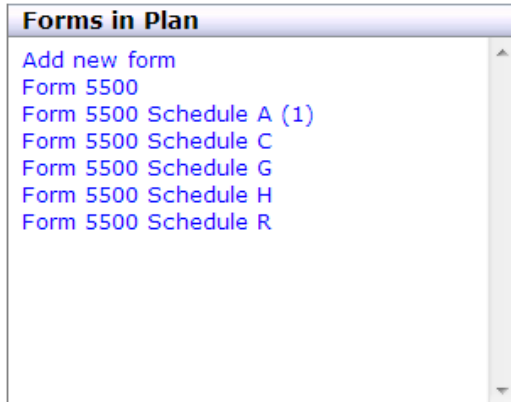


Figure 19

When the preparer selects **Add new form**, they will have the option to select the form or schedule to add.

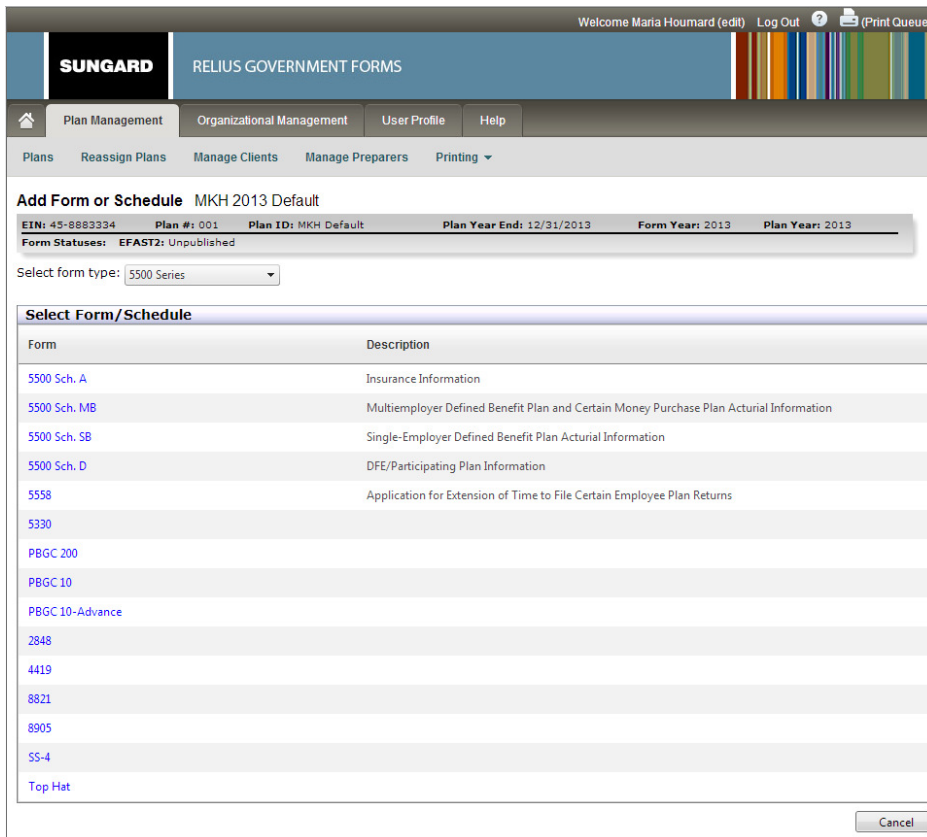


Figure 20

Invited Clients – Will list the client(s) that the preparer has added to the plan. The preparer can change the Role for the client(s). To add a new client select Add, which will display a list of existing clients for the organization. User can select an existing client, or select to Add Client (see figure 22).

Invited Clients						
<input type="checkbox"/>	Username	Email	First Name	Last Name	Role	Client's Status
<input type="checkbox"/>	mariajanco6	maria.janco@relius.net	Maria	Janco	Select role...	Unpublished
<input type="checkbox"/>	mariajanco5	maria.janco@sungard.com	Maria	Janco	Select role...	Unpublished

Figure 21

Welcome Maria Houmard (edit) Log Out ? (Print Queue)

SUNGARD
RELIUS GOVERNMENT FORMS

Plan Management
Organizational Management
User Profile
Help

Plans
Reassign Plans
Manage Clients
Manage Preparers
Printing

Manage Clients for Maria H Org

1 2
Page size: 5
7 items in 2 pages

<input type="checkbox"/>	UserName	First Name	Last Name	Email Address	Contact ID	Status
<input type="checkbox"/>	mariajanco5	Maria	Janco	maria.janco@sungard.com		Active Delete Edit
<input type="checkbox"/>	mthoumard1	Maria	Houmard	mthoumard@gmail.com		Active Delete Edit
<input type="checkbox"/>	mariahoumard2	Maria	Houmard	maria.houmard@sungard.com		Active Delete Edit
<input type="checkbox"/>	mariahoumard3	Maria	Houmard	maria.houmard@gmail.com		Active Delete Edit
<input type="checkbox"/>	willhicks2			will.hicks@sungard.com		New Delete Edit

Figure 22

Manage Preparers

A new role has been created to better manage what access preparers have in Web Client. Prior to the 2014 release preparers did not have access to create new plans and edit certain information directly on Web Client. As we migrate additional functionality to Web Client, access that previously wasn't available to users may now be. A new role – “Preparer Read-only” has been created to limit access available on Web Client. Below is a description of the roles that can be defined for each preparer by the Organization Admin.

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SUNGARD RELIUS GOVERNMENT FORMS

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Plans Reassign Plans Manage Clients Manage Preparers Printing ▾

Edit Preparer

Username: maria.janco *

Email Address: maria.janco@sungard.com *

First Name: Maria *

Last Name: Janco *

Contact ID:

Note: The Contact ID is an optional field needed only for SAML based Single Sign-On.

Status: Active ▾

Organization Role: Standard ▾

View All Organization Plans: Standard

Reset Password: Organization Admin

* Fields denoted with an asterisk

Preparer Read-only

Apply Changes

Figure 23

Standard – This role will give rights to the preparer, such as viewing forms, editing the forms, publishing, enable filing, e-filing, managing clients, and running reports. This role will also provide the ability for the preparer to add new plans on Web Client.

Organization Admin – This role gives the same rights to the preparer as the Standard role, as well as managing preparers and Organization Settings.

Preparer Read-only – This role ONLY allows the preparer to view the forms, enable filing, send notifications, view all organization plans(if enabled), manage clients and change the role of the client. However, this role will not allow the preparer to add plans, add forms, edit forms, delete forms, publish/republish or unpublish plans, change the status to completed, e-file or delete clients.