Relius Documents ASP
On-Demand

Table of Contents

Overview

Relius Documents ASP On-Demand allows users to enter a checklist and submit it online for processing. Users can get their plan document package back within minutes without any subscription fees. You only pay for the plans you want at the time you submit for processing. RD ASP On-Demand is ideal for users that do not preparer a lot of documents a year.

For RD ASP On-Demand prices, go to our support site at https://www.relius.net/Products/sb_Pricing.aspx.

This guide was designed to help you through the basic functions of the RD ASP On-Demand system.

The guide is not intended to replace a Relius Documents ASP Training Workshop, nor does it cover all the available features within the system. There is extensive content-sensitive help available to you within the Relius Documents ASP system.

Register for On-Demand

Before you register for On-Demand, if you are wanting to process any Prototype or Prototype-Formatted documents, you will need to contact Client Services at 1-800-326-7235, select option 6. You will have to pay an annual prototype maintenance Program (PMP) fee before you can create any Prototype or Prototype-Formatted plans. It is important you contact Client Services before registering an On-Demand account so that your On-Demand account will enable rights to the plans you want to process

If you are processing any other plans, such as Individually Designed Plans, Cafeteria, 457, or Self-Funded, you do not need to pay a PMP fee and you can proceed with registering for On-Demand.

To Register for On-Demand, go to https://doc.corbel.com/relius/register.aspx. Fill out the information and click Register. Note: You will only have to do this once. Be sure to write down your login name and password as you will need that information to log in to your On-Demand account in the future.

After you register, you will receive an email with the login information as well as a 6-digit On-Demand customer ID. This information will be needed to log in to your On-Demand account.

Logging in to an Existing On-Demand Account

If you have already registered for an On-Demand account, to log in to RD ASP On-Demand go to https://doc.corbel.com/relius/Login.aspx. You will have to enter your 6-digit On-Demand customer ID, login name, and password.

The Basic Process

The following steps walk you through creating a project within Relius Documents ASP On-Demand. A "project" includes your document files as well as checklist files, and all other files that go hand-in-hand with your document.

Creating a Project
The first step to creating a project is entering data by answering a series of questions specific to your plan.
- Click Project > New.
  - Under the Pay Per Plan Products, select the language type you want
- Click OK.

Checklist Entry

An agreement page will appear. Click I Agree to proceed to the checklist. Note: you will have to do this every time you open a checklist.

Questions will appear on your screen that you will need to answer specifically for the employer for whom you are creating the project. This process is called screen entry or checklist entry.

You may use your mouse and keyboard during the process of entering your checklist. Any time that you type text into an insert box during checklist entry, you are allowed to type 3000 characters. If your inserted text is more than 3000 characters, you will need to modify your document to finish typing your text.

The checklist is displayed in sections on your left. For example, under the "Document Requests" section, you will see all questions referring to the document you want to build such as: Basic Supporting Forms, Format, Spacing, etc.

You may view checklist questions one at a time or view several questions at a time. If you do not know an answer to a question, you can skip it and come back to it later. Once you have answered all necessary questions for a particular section, that section will have a check mark on it indicating that you have completed all questions associated with that section.

Note: Some of our customers prefer to have a blank printed checklist to use as a guide for entering information into Relius Documents screen entry. If you wish to have a printed checklist, you may click on the Printer icon

 on the toolbar of the checklist.

Naming Your Checklist

You may give your project a name by clicking in the upper-left corner of the checklist entry screen. The project name can have a maximum of 32 characters, in which you can use letters, numbers, spaces, or underscore. The following characters are not valid to use in the project name: backward slash (\), forward slash (/), colon (:), questions mark (?), or double quotes ("). You will want to give the project a name that will differentiate it from other projects that you create in the future. For example, if this is a Money Purchase Plan for ABC Company, you may want to name the project ABC Company Money Purchase Plan. You have the ability to rename a project if necessary by clicking on the project name in checklist entry and simply changing the name. If you attempt to Submit or Close the checklist prior to giving the checklist a name, you will be asked to provide one.

Exiting Your Checklist

After you have completed all of your checklist entry tasks, click the Close icon located on the toolbar. If changes were made since the last time you save, it will ask if you will like to save your changes.

Previewing Documents Prior to Submitting

Before submitting your checklist for processing, it is important that you preview your documents. Every time you submit your checklist for processing, you will have to pay. By previewing the documents, it allows you to go back and make and corrections or changes so that you do not have to pay again. To preview the documents, click

Preview Documents icon and select the document you want to preview. It will open a separate window of a PDF version of that document, which will have a watermark of "Unofficial Document Copyright FIS". You can print or download the PDF to show your client as a review.

Creating documents from your checklist

If you have completed all of your checklist entry tasks, click the Submit icon located on the toolbar. If you have not answered all of the checklist questions, you will receive a message about needing to complete the checklist. During the Project Submission Options, it will display the price for the documents. You will have to enter your information, delivery options and check the agreement box and click Next to proceed with your payment. Note: the customer name and company name should only have a maximum of 40 characters. If it has over 40 characters, it will cause an error after clicking Next.

Modifying Your Checklist

If you wish to modify an existing checklist, you can go to Project > Existing. From the Project Listing page, you can enter search criteria such as Project Name, Plan Name, Employer Name, Employer EIN, Catalog Number, or RA Plan ID. Highlight your project and click Open Checklist from your left. NOTE: if you have already submitted your project for processing, you will have to pay again if you make a change and submit for processing again.

Accessing Approval Letters and Basic Plan Documents

For Prototype or Prototype-Formatted documents approval letters and/or basic plan documents, you should have received the documents from our prototype department. If you did not receive or lost these documents, please 1-800- 326-7235 and select option 2 for support to send the documents to you or submit an incident for our prototype department to contact you.

If you are using Individually Designed Plans (IDP), the approval letters and basic plan documents will be included with your documents when you submit your request. However, it can also be found on our support site at http://www.relius.net/products/adp_rdis.aspx.

Relius Documents ASP Training Information

For information on Relius Documents ASP Training locations and schedules, go to our support site at http://www.relius.net/Events/events.aspx?Seminar.

IRS Forms

Although some forms print with the Relius Documents package, there are other IRS forms that you may find helpful. From our support site at https://www.relius.net/Contact/Links.aspx, click Forms to be directed to the IRS Forms, Instructions, & Publications page.

Contact us

The Relius Documents Support Department's goal is to help you with all your questions or problems related to functionality.

Hours of Support
Monday – Friday from 8:30am – 5:30pm Eastern Time

If you have any questions about prices, fees, or invoices, please contact our FIS Relius Client Services department at 1-800-326-7235, select option 6.

If you have any legal questions about what to select in the checklist or language in the documents, please call 1-800-326-7235, select option 4 and a FIS Relius Representative will create an incident for you to submit to our legal team.

For any product questions, issues, or "how to", please contact our FIS Relius Documents Product Support department at 1-800-326-7235, select option 2.