Relius Administration Central Western States User Group

Agenda and Session Descriptions
Thursday, November 14, 2019

7:30 – 8:00	**Continental Breakfast and Registration**	
8:00 – 12:15	What's Coming in Future Releases	See what's scheduled to be released for upcoming versions. Maybe an enhancement request you entered previously is on the horizon.
	Plan Corrections (All Skills Level)	Be prepared to learn how to process some of the following corrections: *Multiple SSNs for the same person; *Last payroll of the year is loaded as the first payroll of the next year; *Ineligible Contributions; *Contributions to the wrong person; *Contributions to the wrong source; *Incorrect loan payments; *Allocating lost earnings; *Import a rehire date or termination date if there is already any existing date in those fields.
	Cash Reconciliation / Trust Accounting (Advanced Skills Level)	When transactions are posted, the records in Relius should match the records at the custodian. At the least, there needs to be a way to compare the records to see if there are any differences. Relius Administration allows you to manually enter or import cash balances from a custodian and compare this to the calculated balance in Relius. Then you can reconcile your cash balances by identifying any differences between what has been processed through Relius and what has been processed through the custodian. You can also offset Relius transactions with custodian activity. We will also take a look at some examples of trust accounting processed via Excel files.
	Dual Eligibility (All Skills Level)	Satisfying a plan's eligibility requirements is the most important thing an employee must do to start benefitting under a plan. But it may not be a one-time thing as plans could have different requirements for different parts of the plan. It's called "Dual Eligibility" or "Source Eligibility" and this session will demonstrate how to set up these different eligibility requirements in Relius Administration, how they are applied when we process eligibility and how they can impact our compliance tests and other results.
12:15 – 1:00	**Lunch**	
1:00 – 4:00	User Defined Fields (All Skills Level)	Learn about and share some ideas regarding how to use User Defined Fields (UDFs) in Relius.
	Current Relius Support Incidents	Discuss your outstanding Relius Support incidents. The trainer and group will see if they can provide some assistance.
	Breakout Sessions: (All Skills Level)	
	Daily Topics	What topics would you like to discuss? Bring your ideas and/or questions! We will get started with: *Commonly used STP tasks; *Online distributions and loans
	Balance Forward Topics	What topics would you like to discuss? Bring your ideas and/or questions! We will get started with: *Unique challenges with balance forward plans; *Allocated links