

# FIS RELIUS NEW ENGLAND USER GROUP MEETING

W E D N E S D A Y M A Y 2 2 , 2 0 1 9

8:30 – 9:00

**Breakfast**

9:00 – 4:00

Topics to include:

**Advanced Compensation** - In a plan, compensation and particularly computed compensation, is the basis for many things. From determining the share of an allocation to compliance testing and points in between. In this session, we'll examine some advanced issues in dealing with compensation including gross versus net, compensation earned prior to plan entry and other items relating to the participant's comp.

**Ideal Salary Calculations** - Partnership and Sole Proprietor entities present special challenges for setup, calculating contributions, compliance testing and other issues. Mostly due to the use of Ideal Salaries rather than entered compensation for the partners and proprietors. In this session, we'll look at these special steps and show how Relius can efficiently perform the needed calculations. The process works for determining contributions, compliance testing and even with the Optimizer.

**Allocated Links** - From setup to import, learn how the allocated link program works within Relius and what vendor options are available.

**Participant Account Import/Export**- The Participant Account Import/Export option allows users to export selected account data within a specified date range for a single account, single transaction or multiple transactions and accounts and can be detailed or summarized. Learn how to best export the data during this session.

**Census & Census DER's** - Census Information in Relius Administration consists of over 200 individual data fields for each and every participant, organized into 7 different screens and 28 tabs. That's the bad news. The good news is what this session is all about. Relius Administration can hold a great amount of information for each plan participant. Many fields are optional, and some are simply personal information. Some fields can be calculated by the system, while others are just using the same fields over again, like payroll. Because there are so many fields to manage, we tend to become creatures of habit—we find one way that works and stay with it because finding a different way might mean delving into an overwhelming sea of possibilities. But that sea contains several tools and processes to make our data input more efficient and accurate. Who knows? Maybe one new way of doing things will make our work easier, our processing more efficient, and maybe, make our whole day.

**Loans** - A session where you provide your challenges/problems with the handling and processing of participant loans. Please email Cheryl Holben at [cherylholben@qpc-inc.com](mailto:cherylholben@qpc-inc.com) with the different scenarios you have encountered and would like to discuss.

Lunch will be provided at Pizzeria Uno