



# Relius Admin User Experience Requested Improvements

# Session Overview

- Enhancements submitted by users
- Preliminary review by RANDUG and FIS Relius to assess positive impact to users and difficulty to implement
- Today's session:
  - Review the updated list
  - Provide feedback on importance/impact
  - Provide input on potential solutions

# Investment Models - 2019

- **Closing Models**

- When a model is closed, the underlying funds should automatically show the model close date.
- Without this date in each fund, you receive a system message about needing 100% model allocation.

- **Closed Funds in Models**

- When assigning an existing model to a new plan, you must add all investments that have been in the model since inception even if already closed and unavailable.
- This adds up to a lot of time adding investments and accounts to a plan only to then enter a closed date.

# Canceling Census

- **Closing Census at Open**
  - Opening Census and prompted with employee selection
  - Click Cancel, but Census opens anyway with the first employee

1 Type all or a portion of the employee Social Security Number and select Find

2 Select an employee

SS #	Name	Employee #
000-00-0002	Naegle, Matthew	
000-00-0008	Spindel, Sean	
000-00-0009	FLINT, WILLIAM R	
000-00-0010	Smith, Tiffany	
000-00-0012	Bridges, Taylor J.	
000-00-0021	Gray, Tiara L	

128 Employees Found

OK Cancel

# Distributions Items

- **Loan Errors with Market Fluctuation**

- Online loans produce an error when the market decreases causing the loan to now be over 50% when the transaction is created.
- Consider adding an exclusion to the create transaction process where loans with a source code created from the website are exclude from applying loan limitations.

- **Invalid Warning on In-Service Distributions**

- This error shows up each time even when age is set to age 59 1/2 or older.
- Warning Message: *The in-service distribution includes source types that should not be included in an in-service distribution.*

- **Fee Out Distributions**

- For distributions below the fee amount, there should be an option to take the whole amount as a fee – “take fee first” option.

# Distributions Items

- **Use Only Designated Investments**
  - When selecting investments to use for distributions, loans, and fees, closed investments are also displayed.
  - They should either be excluded or have a way to filter them out.

Select Sources and Investments

Select All Sources

Available Sources	Use	Order
Employer Profit Sharing	<input type="checkbox"/>	
EE deferral Deferrals	<input type="checkbox"/>	
EE deferral Roth Deferral	<input type="checkbox"/>	
Unrelated rollover Rollover	<input type="checkbox"/>	
ER match Match	<input type="checkbox"/>	

Select All Investments

Available Investments	Use	Order
AllianzGI Mid-Cap Fund R	<input type="checkbox"/>	
American Funds Growth Fnd R2	<input type="checkbox"/>	
American Funds SMALLCAP R2	<input type="checkbox"/>	
American Funds-AMCAP Fund R2	<input type="checkbox"/>	
Davis New York Venture R	<input type="checkbox"/>	
Davis Real Estate Fund	<input type="checkbox"/>	
Oppenheimer Core Bond Fund R	<input type="checkbox"/>	
Oppenheimer Developing Markets	<input type="checkbox"/>	
Oppenheimer Main Street Mid Cap	<input type="checkbox"/>	

OK Cancel

# Web-Related Items

- **Report Sorting on Sponsor Web**
  - Add back the ability to click on the header and sort reports listed on website
- **Roth Basis on Participant Web**
  - Display the Roth basis on the website so participants can view
- **Archive Old Web Messages**
  - In the web messaging utility, allow user to deactivate or archive old messages so list of available messages is shorter.

# Web-Related Items

Modify Files

File options

File name: DIST-Required Minimum Distribution.p Description: DIST-Required Minimum Distribution

Open in new window

File type: Form

Prospectus: Yes

Plan assignments

	Plan ID	Viewable By	Viewable From	Viewable To	Description	
1	0004010	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
2	0008310	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
3	0009610	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
4	0017012	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
5	0042210	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
6	0065410	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
7	0067611	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
8	0080810	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
9	0088010	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
10	0089510	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
11	01000010	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
12	01000510	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
13	01001410	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
14	01001610	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
15	01002210	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (

Add Assignment Remove Assignment Save Cancel

- **Web Database Utilities**
  - To replace a form assigned to multiple plans, you must delete the existing form and add a new form back along with all the assignments and details.
  - Need a way to upload/replace file and leave all the existing details in place.



# Miscellaneous

- **Manual Trade Settlement**
  - Ability to identify trades by transaction ID and settle the transaction in bulk manually.
  
- **Investment Election Changes - Audit**
  - In 2018.2, there is a field for entered date, but the user isn't displayed.
  - The Admin ID of the user is stored in the tables but not visible in Census.
  
- **Investment Products Search**
  - Currently no search option when viewing models so you must scroll.
  - Ideally there would be the ability to search by model ID or name.

# Rate of Return – Historical Data

Historical Report Table Maintenance

Report data selection criteria

Select Single plan

Report name: RPARTCRT

Administrator: RCUSTOM

Request ID: RPARTCRT

Report date from: [ ]

Report date to: 11/10/2018

Load Report Data

Copy report data

Select the sets of report data to be copied to the historical report data tables and choose the overwrite option before selecting Copy To History

Overwrite existing data: Always

Copy To History

Standard report data | Historical report data

Select All

Copy to History	Report Name
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- **Storing Rate of Returns in Historical Tables**
  - Need the ability to run the RPARTRET report so returns can be generated

Questions?

Additional ideas?

We hope this session was helpful and will provide meaningful enhancements for you.

Thank you for attending!  
Enjoy the rest of the conference.

**RANDUG**  
Relius Administration National Daily User Group

