Relius Admin User Experience
Requested Improvements

Session Overview

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- 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

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- **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

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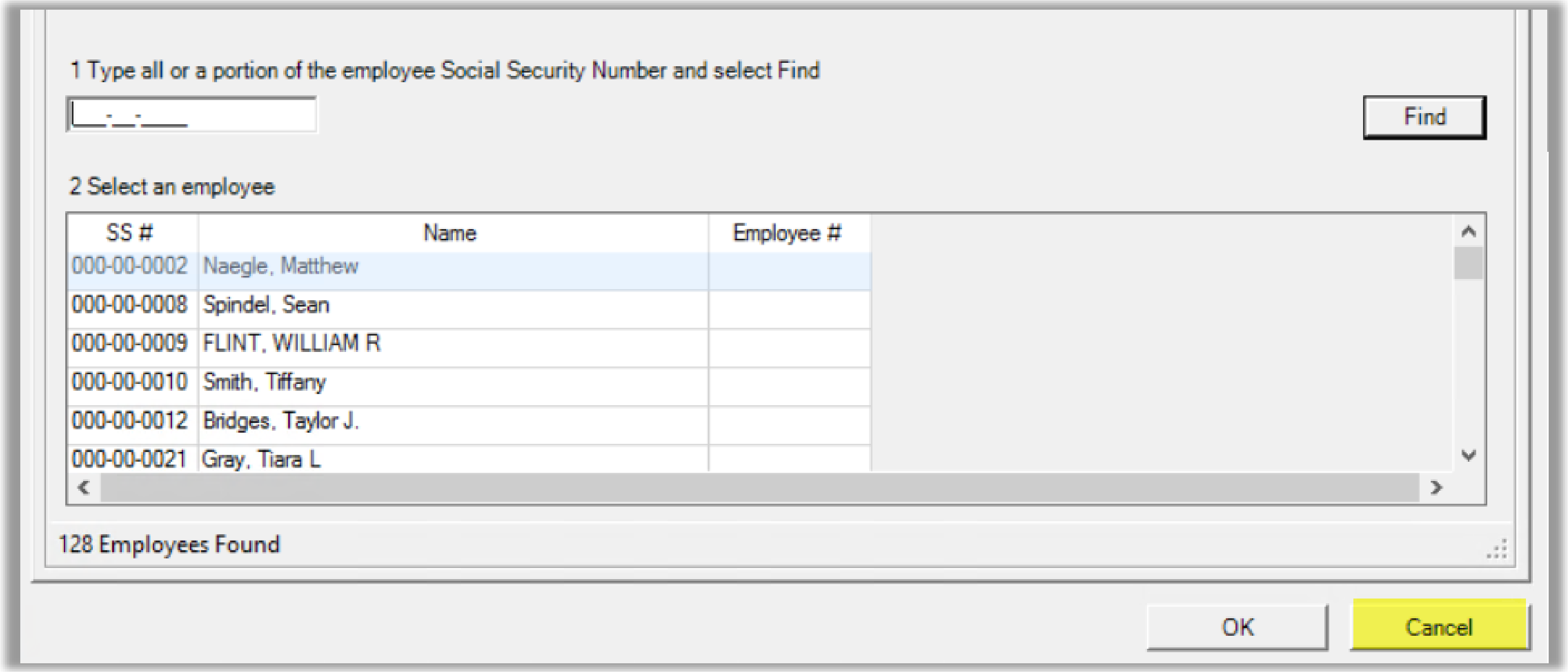
- **Closing Census at Open**
  - Opening Census and prompted with employee selection
  - Click Cancel, but Census opens anyway with the first employee



Distributions Items

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- **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.
  - <u>Warning Message</u>: *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

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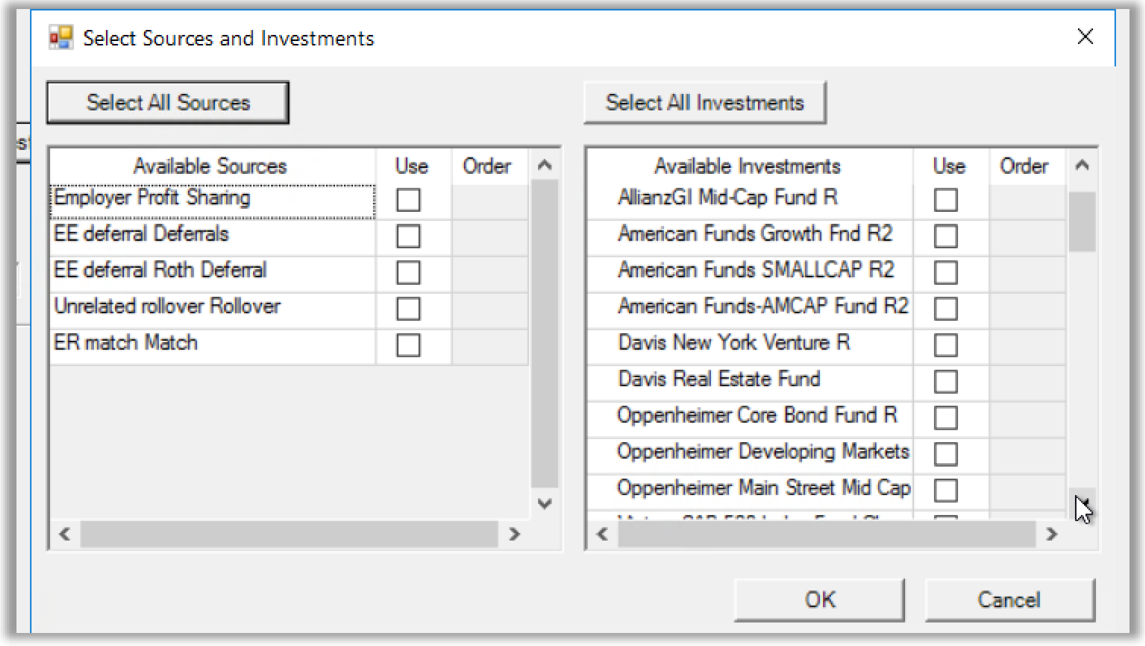
- **Use Only Designated Investments**
  - When selecting investments to use for distributions, loans, and fees, closed investments are also displayed.
  - They should either be excluded or have a way to filter them out.



Web-Related Items

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- **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

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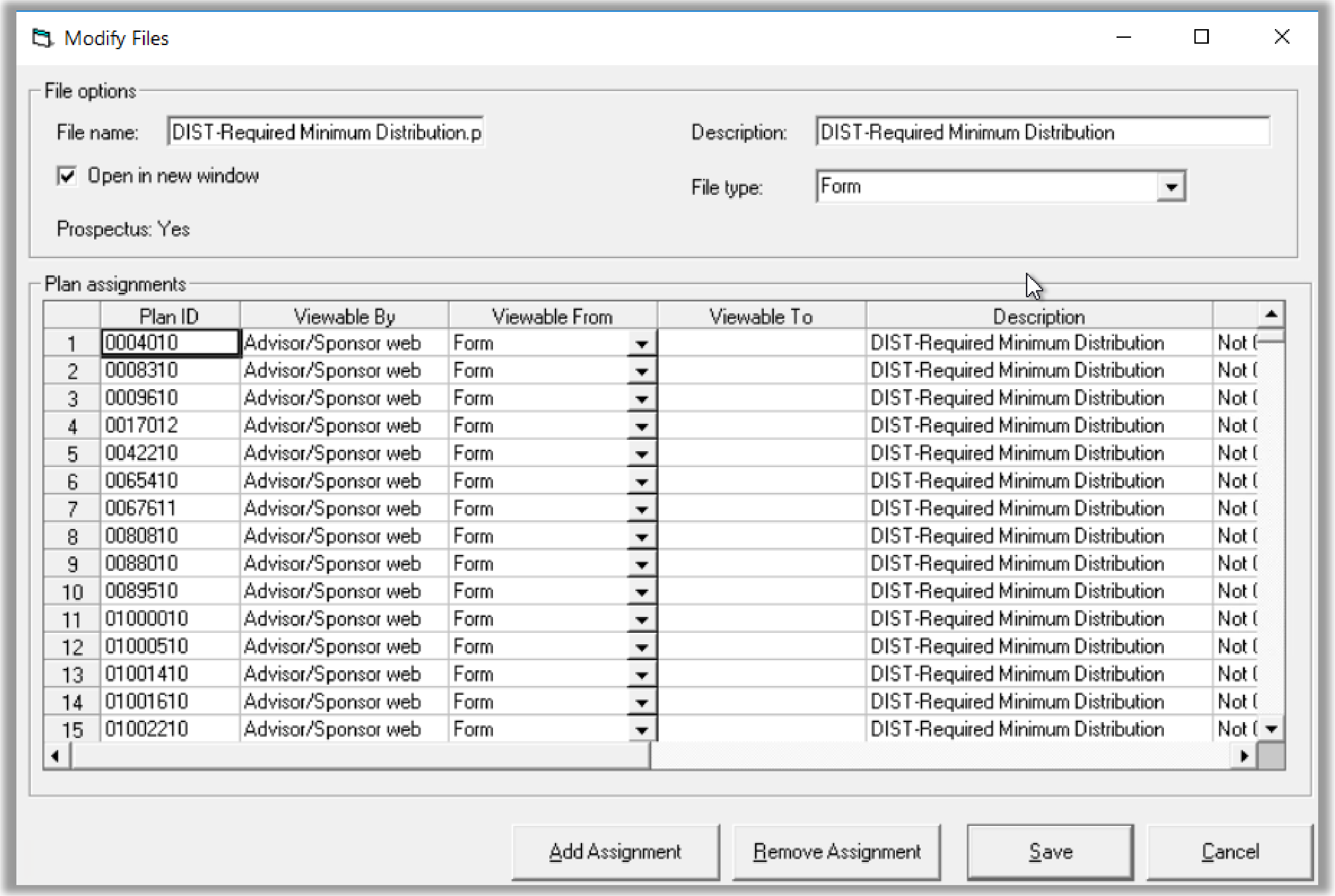

	Plan ID	Viewable By	Viewable From	Viewable To	Description	
1	0004010	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
2	0008310	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
3	0009610	Advisor/Sponsor web	Form		DIST-Required Minimum Distribution	Not (
4	0017012	Advisor/Sponsor 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 (

- **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

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- **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

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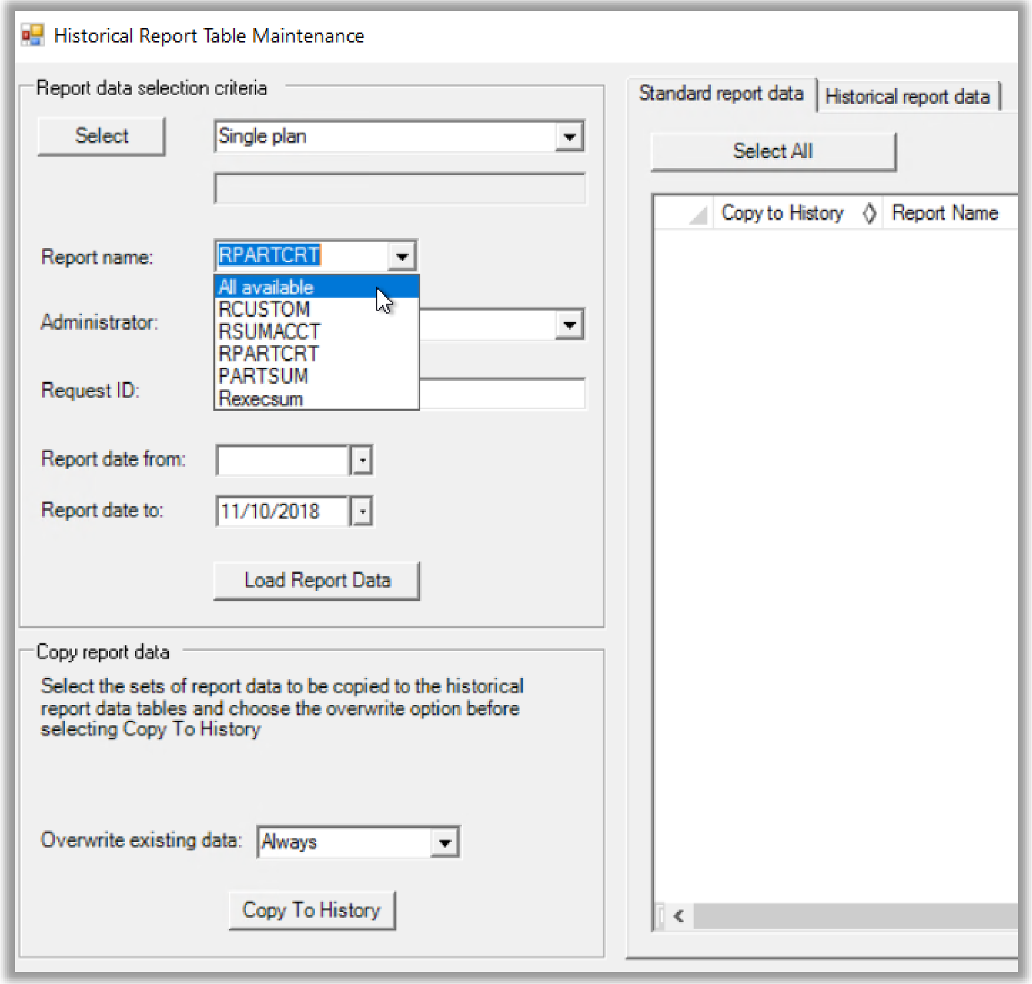

- **Storing Rate of Returns in Historical Tables**
  - Need the ability to run the RPARTRET report so returns can be generated

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.

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