

Compliance Planner

problem:

Employers are seeking a tailored checklist of actionable compliance tasks that can be assigned and tracked easily.

solution:

Compliance Planner creates a custom checklist, executes tasks and sends notices, all from a single system.



Benefits

- ✓ Checklists & notices are customized
- ✓ Send & track notices within the tool
- ✓ Send automated email reminders
- ✓ Perform tasks like testing in the tool
- ✓ User-friendly, cloud-based tool
- ✓ Detailed help text and videos
- ✓ Store documents for audit purposes
- ✓ Maintained up-to-date with regulations

Compliance Planner

Employer: checklistemployer (342342342) Plan Year: 2020 Configuration Name: 2020

Setup Compliance Planner

Compliance Planner

ERISA	12	0	0	0
COBRA	10	0	0	0
ACA & Group Health	16	0	0	0
Section 125	8	0	0	0
Health FSA	8	0	0	0
DCAP	9	0	0	0
HRA	8	0	0	0
Self-Insured Health Plans	8	0	0	0
HIPPA	14	0	0	0

Status: * Not Star

Due: * When plan is established

Set Email Reminder: * Select

Description: * ERISA §402 does require that every welfare plan "be established and maintained pursuant to a written instrument." Through the written instrument, participants are on notice of the benefits to which they are entitled and their own obligations under the plan. The written instrument also provides the plan administrator guidelines by which to make decisions.

Relevant Links: *

Update Task

Plan Tasks.

Execute.

Track.

