To: All DATAIR FlexPlus Clients
From: The FlexPlus Development Group
Date: December 2, 2008
Re: Release of CA 1.09

We are pleased to send you version 1.09 of the DATAIR Cafeteria Administration System.

This release contains the following new features:

- Support added for Section 132(f) Transportation Benefits
- ASCII Import added for Enrollment, Claims, and Testing
- "Testing Only" mode when using imported testing data
- "Send to DATAIR" feature added
- "Employee Envelope" report added

The attached Release Notes includes a detailed list of new and changed features of the system. Please be sure to thoroughly review the Release Notes and the Installation Instructions **before** installing the new release.

CA 1.09 Release Notes

New Features

Support added for Section 132(f) Transportation Benefits

FlexPlus now supports administration of Section 132(f) Transportation Benefit plans. Support for all 132(f)-qualified benefits is supported except the new Bicycle Commuter benefit added by the Economic Stabilization Act of 2008 which becomes effective January 1, 2009. We anticipate adding this benefit at a later date. See the 132(f) section of the User Guide (Help | Contents) for additional information.

"Testing-Only" mode when using imported testing data

Tab 2 (Plan Info) of the Plan Information screens now has a Testing Only checkbox. When this is checked, the plan is placed into a discrimination testing only mode and Claims, Contributions, Payments, and the Check Register will be disabled. Data can then be imported into FlexPlus for situations where the system is just being used for discrimination testing and not ongoing administration.

ASCII Import added for Enrollment, Claims, and Testing

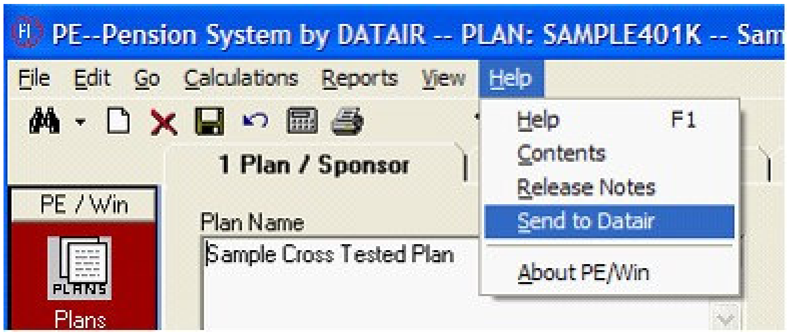
Version 1.09 allows for importing of data for the purposes of enrollment, claims, and discrimination testing. The import for testing works with the "Testing Only" mode described above. ASCII Record formats for these imports may be found in the User Guide (Help | Contents)

"Send to DATAIR" feature added

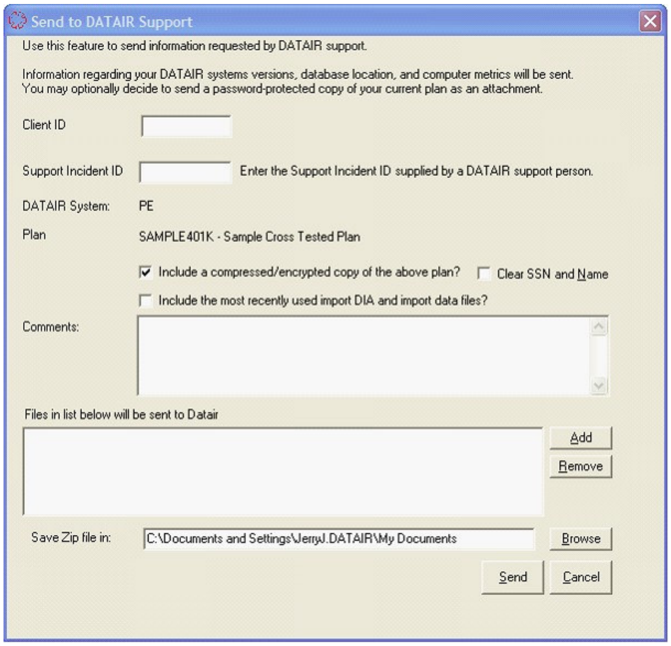
When working with Customer Support or Technical Support, you may be asked to send your plan and other files to DATAIR. It will provide us with a copy of your plan and other technical information about the system and its operating environment and helps both administrative and technical support personnel assist you. This feature is used to create a zip file that will be automatically and securely be sent over the internet to DATAIR. Minimal user interaction is required. Upon successful transmission, the support person assigned to this support incident will be automatically notified that the file was received.

Note--*You need to have an active internet connection to optimize utilization of this feature. If you do not, a message will display telling you how to manually send the Send to DATAIR file as an email attachment.*

To access this feature, choose "Send to DATAIR" from the Help menu bar:



Click on "Send to DATAIR" and a new window will open



You will need to enter a "Support Incident ID" and you may need to enter the DATAIR “Client ID”. The “Support Incident ID” will be supplied by the DATAIR support person with whom you are working. The "Client ID" should automatically be filled-in for you from information retrieved from your license file. The system will display a message prompt if either field is not populated.

If you wish to send additional files, click the “Add” button to browse for the files DATAIR support has requested. (i.e. databases, import files, etc.) Click “Send” when you are ready. The bottom of the window displays messages and a status bar that will indicate how long the transfer will take.

When you click on the Send button, a zip file is created in the file path shown in the "Save Zip file in" box. You can manually key in the file path or use the Browse button. There is normally no need to change the default path specified. If the Send to DATAIR is successful, the temporary zip file will automatically be deleted.

If the Send to DATAIR is unsuccessful (inactive internet connection, for example), you will get the message prompts shown below indicating the failure and the zip file will not be deleted.

You should then e-mail the zip file to the person at DATAIR handling this particular support issue.

Issues Addressed:

- Find Employee
  - Default to the currently selected employee.
- Employee
  - When the ACH or HSA information changes, prompt whether to copy the new information over to other plan years.
  - Add a blank option to the Employee's Sex to allow the field to be cleared if needed.
  - Warn if ACH account information is entered, but the checkbook used by the plan does not have the `Use ACH' option checked.
  - Don't allow deletion if the employee has any enrollments, claims or benefit rates entered in the system for any plan.
  - Restore the Notes entry window to its proper size.
- Plan Information
  - Prevent deleting a plan year that has claim or checkbook entries.
  - Close the plan if deleting the plan year that is currently loaded.
  - Refresh the Tool Bar, List Bar and Folder View when deleting a plan year.
  - Fix the Up One Level feature to be intuitive and consistent; Don't clear the Folder View when moving up one level to Plan Year List; Clear all plan data when moving from the Plan Year List up to the Find Plan screen.
  - Warn if any plan year in the plan had a Plan Recalc cancelled in the middle; if it was cancelled for the current Plan Year, then run a Plan Recalc automatically.
- Calendar
  - For Benefit calendars, don't allow changes to any dates on or before the last payment date.
  - Clicking Re-calc for monthly or quarterly frequencies selects the proper dates in months after February, when the start date is the 29th of a month or later.
- Benefits
  - Issue a warning when a Check Group is selected but Print Check is not.
  - Issue a warning when a Check Group conflicts with other benefits that have the same Check Group selected.
  - When entering benefit rates, add the ability to select employees from the employee list, instead of having to type in the SSN to create override rates.

- When saving a benefit, issue a warning and view a list of any enrollments that violate the benefit maximums entered.
- Allow changes to individual benefit rate lines instead of prohibiting changes to all rates; only prohibit changes to rates that already have contributions.

➢ Enrollment
- Payroll calendar default - The calendar must be intentionally selected. If there is not a default employee calendar, it does not default to the first one in the list if there is more than one payroll calendar available.
- The enrollment dates and the payroll calendar must be selected before retrieving the benefit rates from the table.
- Re-calculate the enrollment rates from the saved benefit rates whenever the payroll calendar is changed.
- When loading, issue a warning with the option of viewing a list if any enrollments violate the applicable benefit maximums.
- Fix validation of reimbursement benefit maximums, where amounts are entered into more than one column.

➢ Claims
- Prompt whether to delete the entire claim when deleting the last claim item of an existing claim, instead of forcing the deletion and clearing the benefit and date submitted.

➢ Master Claims
- Warn and exit if benefits exist, where all have a classification of Other Reimbursement or MSA.
- If paid amounts exist for the master claim item, disable changes to the Classification Code.
- Saving existing master claims now re-uses the underlying claim numbers whenever possible, to avoid unnecessary gaps in claim numbering.
- Prevent from saving if the Incurred To date is prior to the Incurred From date.
- A status of Denied: Not Enrolled takes precedence over a status of Denied: Past Run-out.

➢ Claims Processing
- Fix sorting of employee name, and include the middle initial and suffix in the display.
- Fix the adjudication of claim items that were manually set to a status of Denied.
- Display the most recent claims, instead of the earliest in the plan year.
- Retain the sort order after deleting a claim.
- Fix errors when searching for an employee name that contains an apostrophe.

➢ Pay Claims
- Allow Outside Insurance to print on the same check as claim payments if they share the same Check Group.
- Don't group insurance premiums based on Check Group if the providers are different.
- For HSA payments, issue a warning if ACH is not enabled in the checkbook.
- Never create checks for HSA payments, even if ACH is not enabled in the checkbook.
- Disable the framework tool bar, list bar and folder view while processing.
- Fix the payee city/state/zip when creating Check Register entries.

➢ Check Register
- Create an audit log for all manual changes made to transactions through the Edit screen.

➢ Global Checkbooks
- Add a button to delete unused global checkbooks
- Only allow deleting a global checkbook if no active transactions exist in the check register.

➢ Corrections
- Rollback
    - Deduct amounts from the YTD Paid account totals when rolling back Premium payments.
- Plan Recalc

    - List any enrollments for the plan year that violate the applicable benefit maximums.
    - Fix all Null values in fields added through a database update.
- Pre-Enroll
  - Round down amounts when reducing reimbursement enrollment amounts to the maximums specified per benefit.

Reports:

- General
  - When exporting to an Excel worksheet, create the page breaks between pages.
  - Update DC and DB limits for 2008.
- Employee Communication Reports
  - Resolve the problem with randomly disappearing report headers.
- ACH Advice
  - Restore the detail section to print at the top of the report.
  - Provide two individual check stub choices to enable different information to print on each stub.
- ACH File Generation
  - Use the prefix specified in options when generating the output file.
- Print Checks
  - Use the prefix specified in options when generating the output file.
  - Provide two individual check stub choices to enable different information to print on each stub.
  - When creating checks, sort by the employee name and not the employee ID.
- EOB
  - New document, which contains settings in the Options screen to properly position the employee name and address inside an envelope window once folded.
  - Center the column header for Date Incurred.
- Employee Envelope
  - New document, provides choices for the most common envelope sizes, and even provides a way to print a custom or odd-sized envelope.
- Enrollment Report
  - Increase column sizes to accommodate larger numbers.
- Account Status
  - For HRA plans, show the proper beginning balance of the account.
- Transaction Activity
  - For HRA plans, show the proper beginning balance of the account.
  - Print the claim number for each claim entry.
- 25% Dep. Care
  - Pass the test if the percentage is exactly 25%.
- 55% Avg. Benefit
  - Pass the test if the percentage is exactly 55%.
- EE Eligible by Benefit
  - Fix missing date of birth and date of hire on subsequent pages, for each benefit.
- Options – Batch Print Defaults
  - Allow entry of an alternate location to export documents to, as opposed to the My Documents folder.
  - Add new prompts for a custom file name `prefix' for both ACH File Generation and Print Checks.
  - Default to the RTF file names specified on the File Options tab.
  - Default to the items selected on the Print Options tab.
  - Fix the implementation of the Suppress Date and Suppress PlanIdent options on reports.

    - Add defaults to the Print Options tab to adjust the top and left position of the address on the EOB, allowing it to properly fit into an envelope window.
- Resolve report column alignment issues
    - Line up columns exact with column headers to avoid an intermittent Active Reports problem that misaligns column data.
        - Plan & Participation
        - Contribution
        - Trial Contribution
        - Account Balance