BLAZE SSI®   TECH Sheet

Eligibility Determination

The web-based **Eligibility Determination Module** complements any recordkeeping system by determining employee eligibility for plan participation and for multiple allocation types. Supports independent participation requirements for each allocation type. Produces results as MS Excel workbook columns and as PDF-formatted reports. Data entry is supported via a fully-validated MS Excel workbook.

1. APPLICATION FEATURES
+ Determines the eligibility for each employee in census based on user-entered criteria
+ Supports Eligibility determination for Plan Participation and Plan Allocations:
    - 401(K) Elective Deferral;
    - 401(m) Plan Sponsor Match;
    - 401(a) Plan Sponsor Contribution;
    - 416 Top Heavy Allocation;
    - 401(k) QNEC or 401(m) QMAC;
+ Supports:
    - Multiple entry dates;
    - Minimum age; service, compensation and hours worked
    - Minimum age "and/or" service requirement;
    - Participation dates override options.
+ Complements any pension or recordkeeping system from any vendor on any platform
+ Calculation performed rapidly with results entered into user's workbook for easy review

2. USER INTERFACE FEATURES
+ Easy and familiar, fully-validated MS Excel workbook for data entry
+ User Guide and on-line documentation
+ Automated data validation and input error trapping
+ Reports automatically prepared in .PDF file for view, print, archive and email

3. CUSTOMER SUPPORT
+ System kept up-to-date with applicable government regulations by BLAZE SSI
+ Basic and customized training available
+ Systems consulting and custom programming available
+ HelpLine support via email

4. OPERATING ENVIRONMENT SUPPORTED
+ MS supported Windows OS; Internet connection and Browser
+ MS Excel 2003+; MS .NET Framework 4.6.1
+ Web application maintained on secure BLAZE SSI web server
+ No BLAZE SSI software to install or update

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Eligibility Determination

Complements any Record-keeping System Increase the accuracy of eligibility determination and decrease dependence on undocumented worksheets with the BLAZE SSI Eligibility Determination Module. This module is not limited to any specific database or record-keeping system and can interface easily with any system or database. Comprehensive eligibility criteria for each plan allocation type are supported by the software.

Fully-validated User-interface The BLAZE SSI Eligibility Determination Module requires minimal input using easy-to-understand MS Excel plan- and census-level worksheets. The included worksheets are fully documented and validated for speed and accuracy. The module highlights any user-input errors which can be reviewed simultaneously with the input worksheet for quick correction by the user.

Adaptable to any Workflow The worksheet information can be input manually, copy/pasted from an external source or filled from a user-created query of the user's record-keeping system database. System results can be emailed, entered into the record-keeping system and archived in a document retrieval system.

Accurate, Comprehensive Results For each plan allocation type, calculation results show census-level columns indicating each employee's eligibility to participate on the valuation date, anticipated participation date and age, and, if ineligible, the reason. Independent participation requirements are supported for these allocation types: 401(K) Elective Deferral; 401(m) Plan Sponsor Match; 401(a) Plan Sponsor Contribution; 416 Top Heavy Allocation and 401(k) QNEC or 401(m) QMAC.

Results also include a client-ready, pdf-format document illustrating the user-entered Plan Provisions, one plan-level report with the definition of each set of eligibility requirements and one census-level report for each set of plan allocation eligibility requirements listing each employee and the results of the eligibility determination.

Easy System Deployment Since the system is maintained by BLAZE SSI on secure web-servers, the user's PC requires only an Internet connection, recent-version web-browser and Microsoft Excel (2003+). The system is always up-to-date with no maintenance updates to apply. User-input information and system results can be saved at the user selected location for convenience and security.

Pay only for Completed Results System costs are based on completed eligibility calculations. There is no charge until the system determines the requested calculation. Users pay only for their actual use of the system, not for processing invalid user input or data storage.

Quality Professional Support from BLAZE SSI The BLAZE SSI Eligibility Determination Module is kept up-to-date by the BLAZE SSI staff. Using this system will save you time and effort.