PENDEAS

Quick Start Guide

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PENDEAS
Quick Start Guide

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SAMPLE REPORTS:
View sample reports for PENDEAS and other BLAZE SSI qualified plan systems on-line at www.blazessi.com.

MORE INFORMATION:
The PENDEAS Quick Start Guide is intended for new users. More detailed information about PENDEAS is available in the PENDEAS Intro Guide and the BLAZE SSI Central Intro Guide. These guides are available to licensed PENDEAS users in the system Help Menu and are also on-line at www.blazessi.com.

Visit the BLAZE SSI website at www.blazessi.com to learn more about PENDEAS and other BLAZE SSI software products. Contact BLAZE SSI with your questions or to license PENDEAS:

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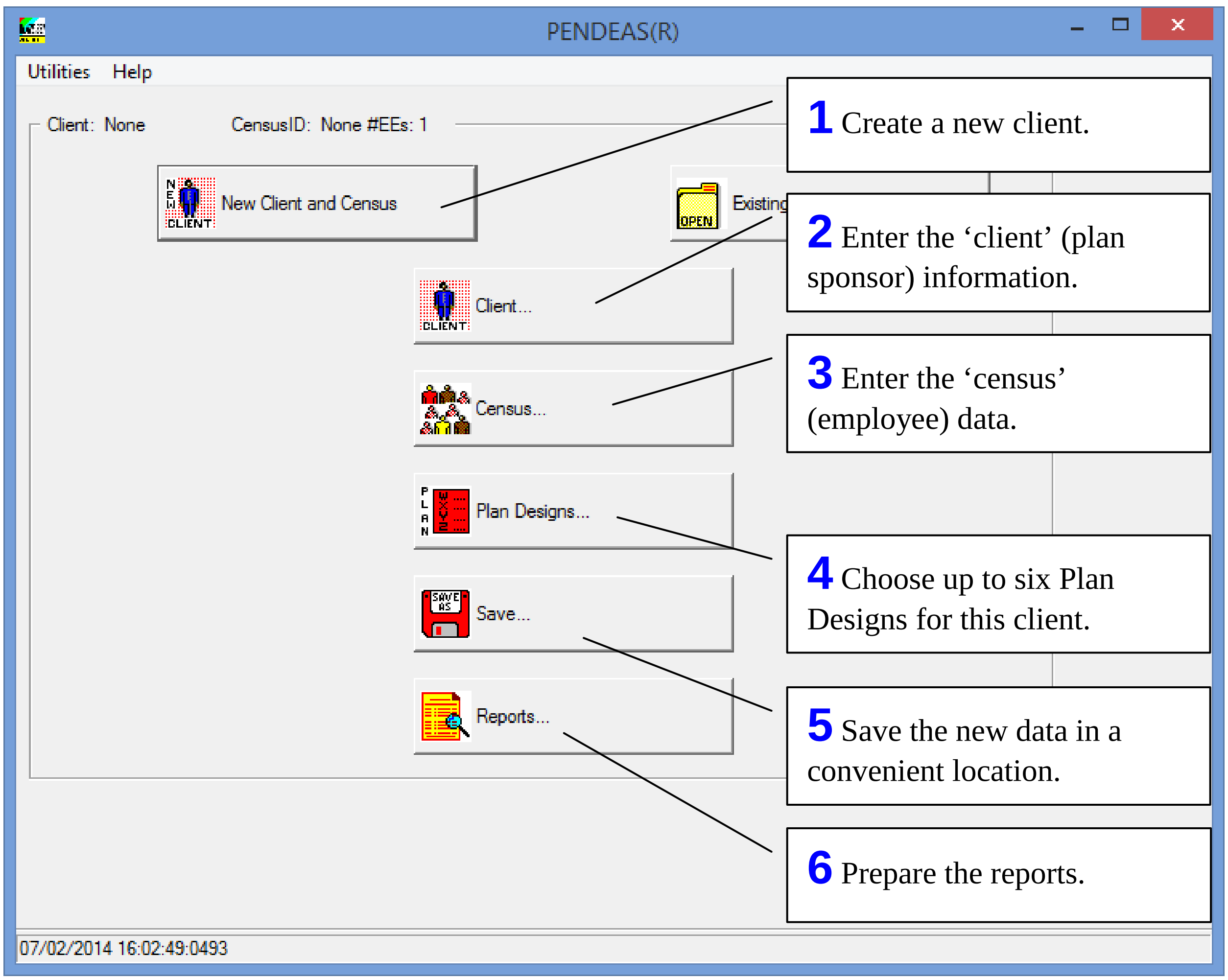
The Main Form: PENDEAS Workflow

It's simple to prepare qualified plan designs – from the entry of the data to the completion of the finished illustration; it's just a few easy steps.

When you open PENDEAS you will see the 'Main Form' which presents buttons shown in the order of the suggested system workflow.

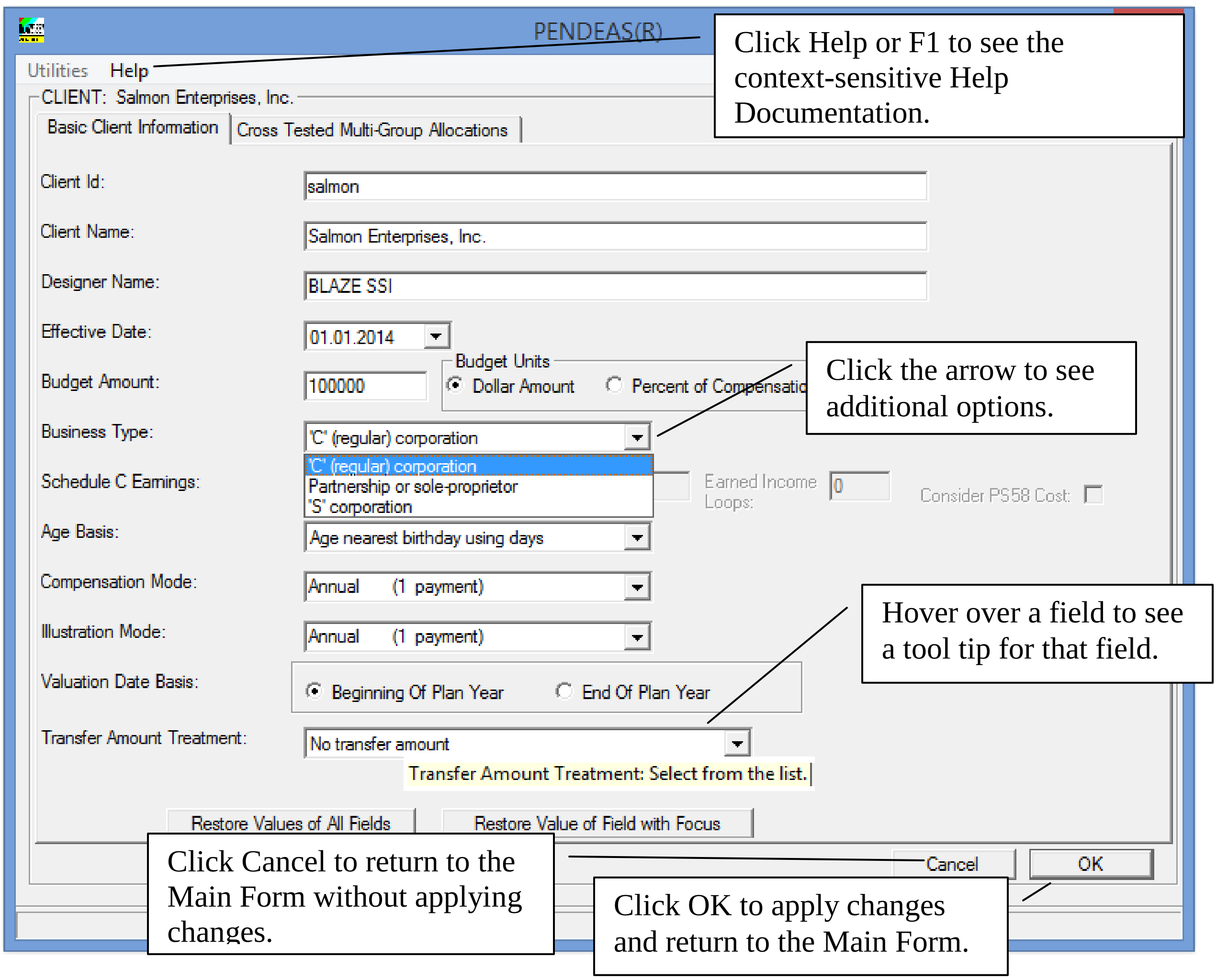
To begin, Click New Client and Census.



Client: Enter Client Data

<u>Click Client on the Main Form</u>. Client data is divided into two tabbed sections: Basic Client Information and Cross Tested Multi-Group Allocations. Click the tab to switch from one section to the other. To simplify data entry the fields are well documented with 'tool tips' and context-sensitive 'help documentation,' which is available by using F1 or the Help menu at the top of the form.

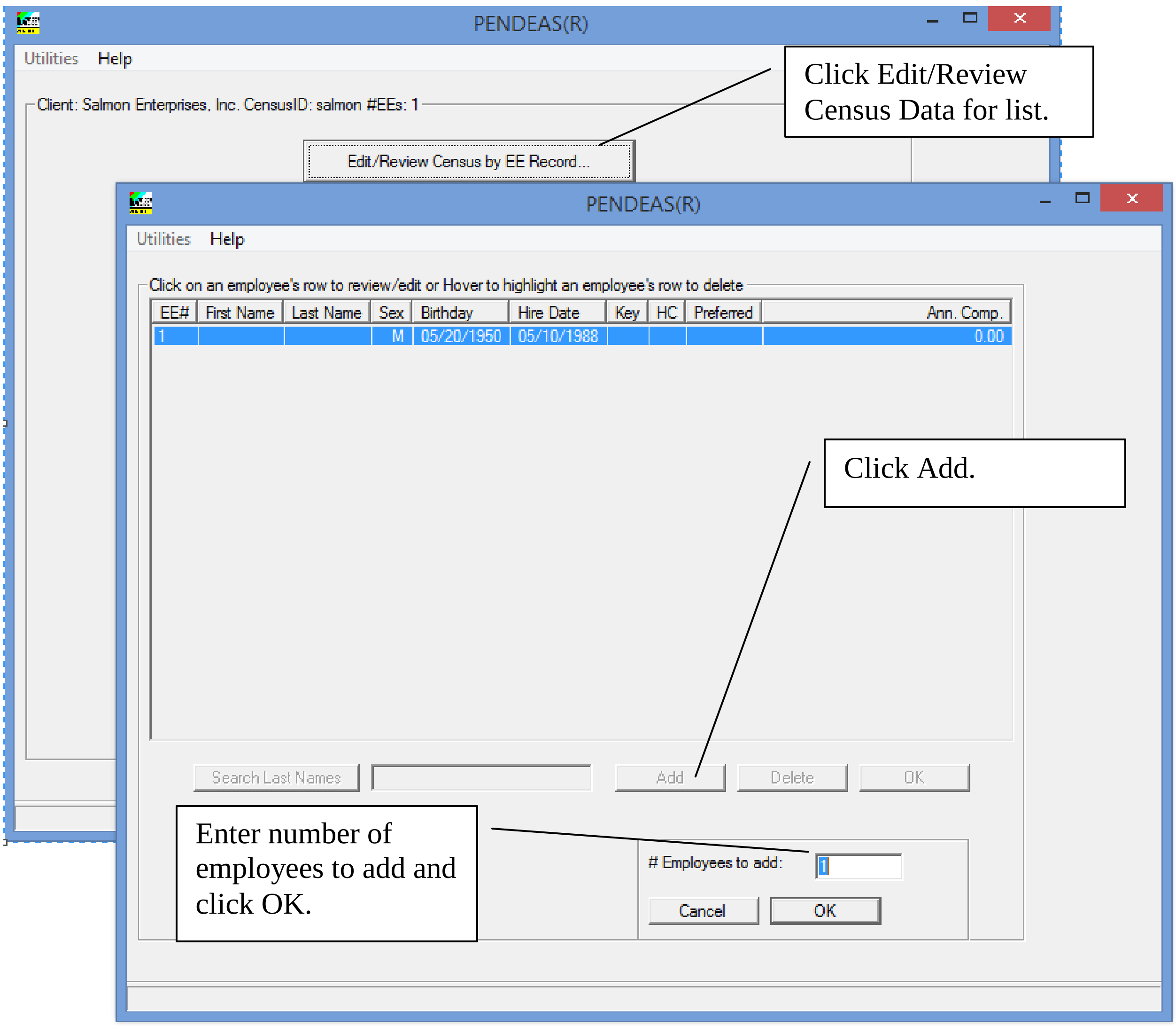
When you complete the entry of the client data, click OK to return to the Main Form.



Census: Enter Census Data for a New Plan

Click Census on the Main Form. Click Edit/Review Census by EE Record to see a list of the employees. PENDEAS creates one ‘default’ employee record for a new illustration.

Click Add to enter the number of employees to add. Click OK and additional default employee records will be added to the list.



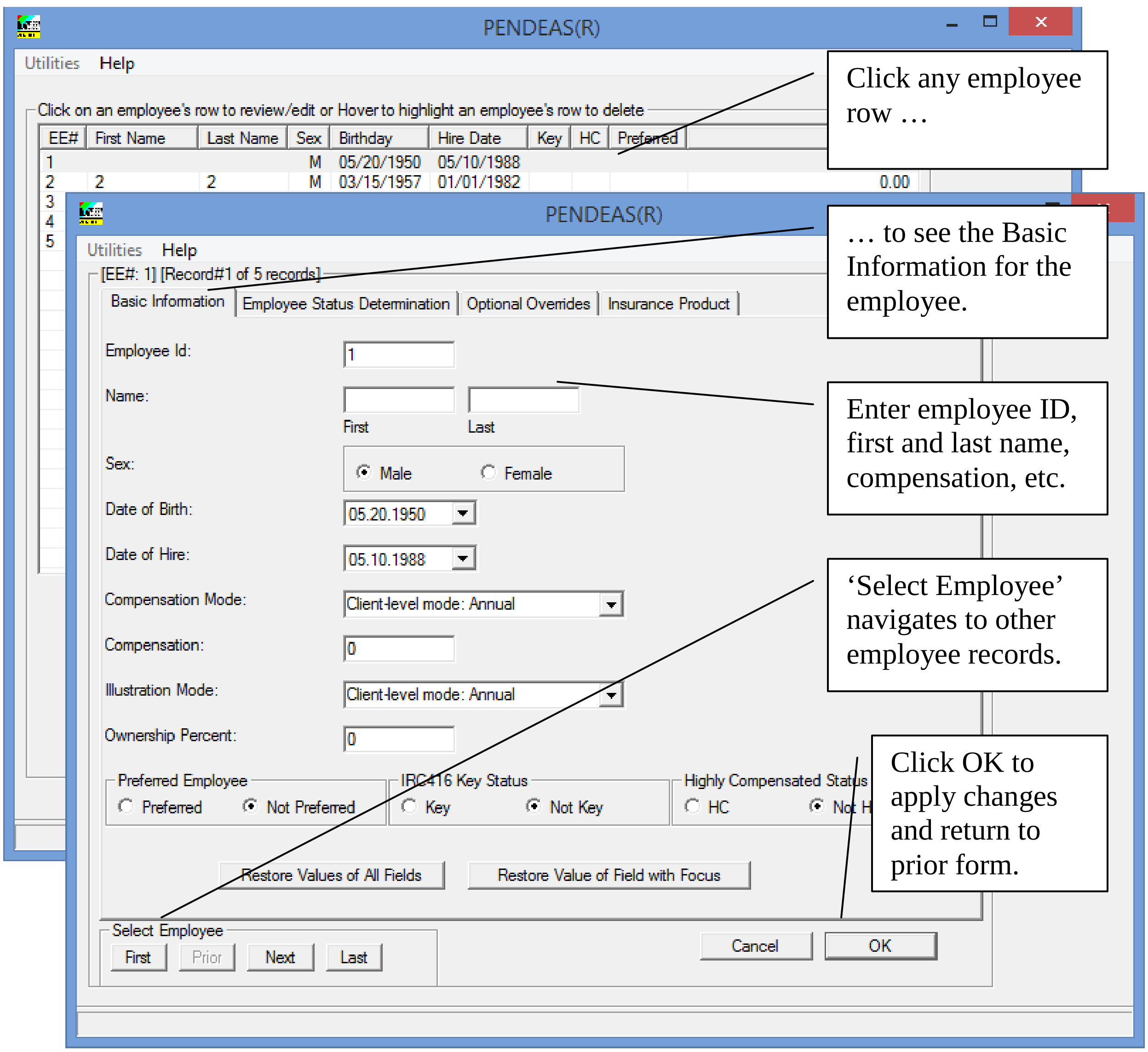
Census (continued)

Additional employee records are now shown on the list. Click any employee to see the Basic Information for that employee. Use the Basic Information tab to enter employee data.

Use the Employee Status Determination tab if you want PENDEAS to determine the status. If the plan has no insurance or employee-level overrides then using these tabs is not necessary.

As an alternative to entering data on this form, see the PENDEAS Intro Guide Utilities: Import/Export for information about using MS Excel to import and export census data from PENDEAS.

Click OK to return to the prior form.



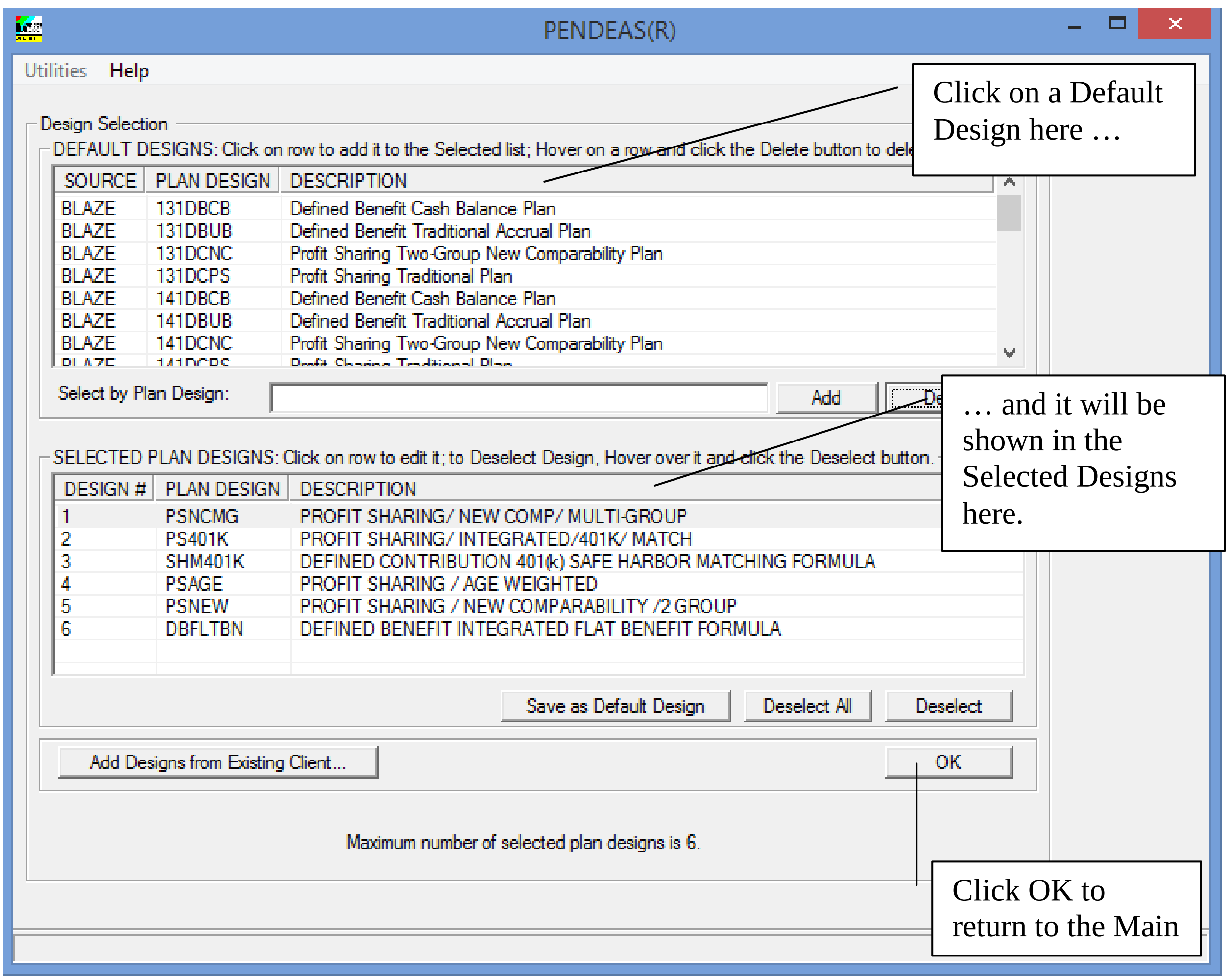
Plan Designs: Select Plan Designs to Illustrate

Click Plan Designs on the Main Form. Select up to six designs from the Default Designs list and they will be added to the Selected Plan Designs list.

All users receive BLAZE SSI Default Designs with PENDEAS. Users may create their own plan designs too. Plan designs are used with the census data to create the illustrations for the client.

The PENDEAS Intro Guide describes the editing of Plan Designs and other time-saving features of PENDEAS.

Click OK to return to the Main Form.



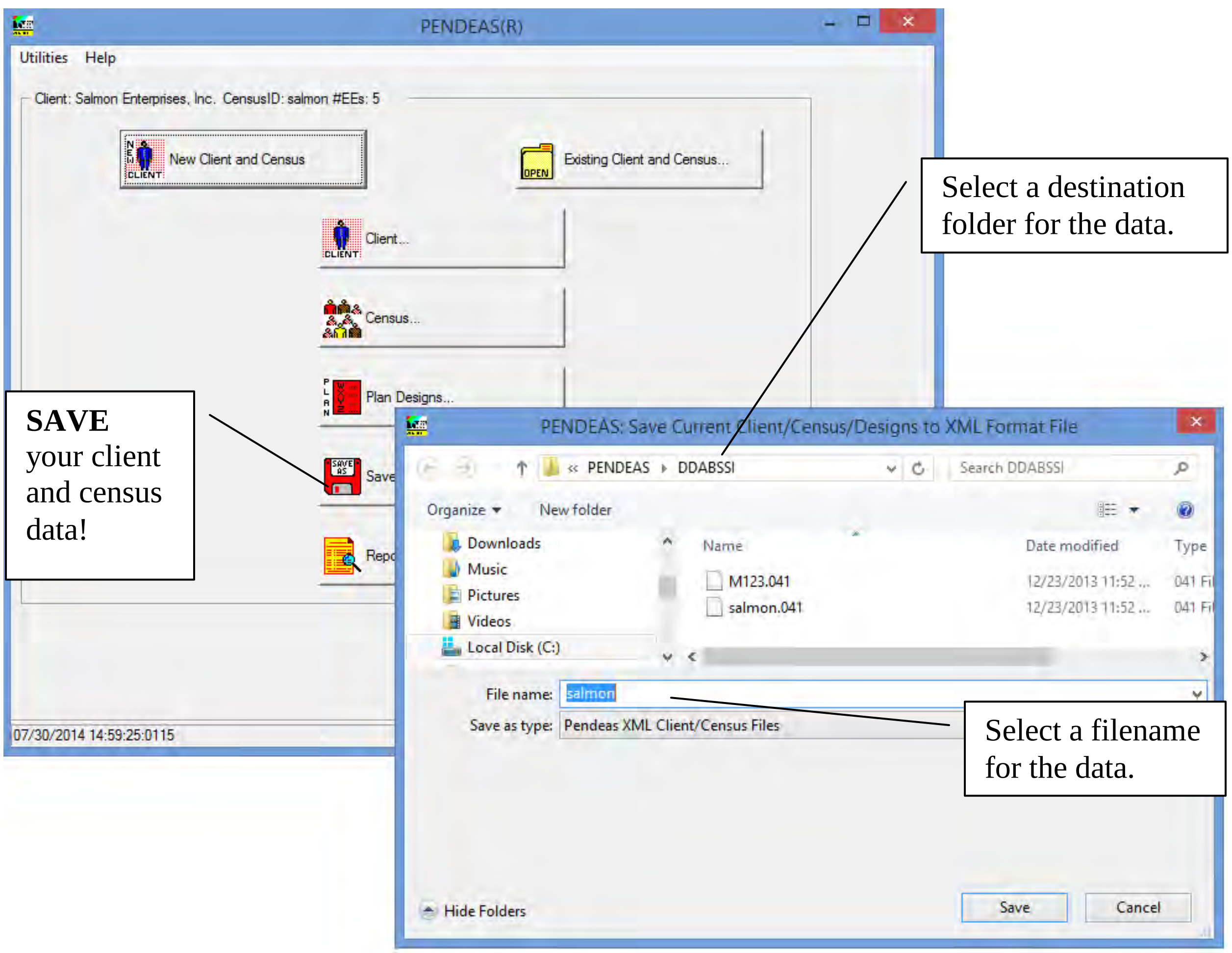
Save: Save Client and Census Data

Click Save on the Main Form. Once you have entered or edited the client and census data, you should save it. **If you close PENDEAS without saving your data, it will be lost. Save before closing (exiting) the system.**

You specify the location and filename for the stored client, census and associated design data that will be used to generate the illustration. The data can be saved to any location for which you have permission. It is not recommended that your data be stored in the \pendeas folder.

You may want to create a special folder to save this data.

Save the data before exiting the system! BLAZE SSI also strongly recommends saving data before printing reports or editing system preferences.

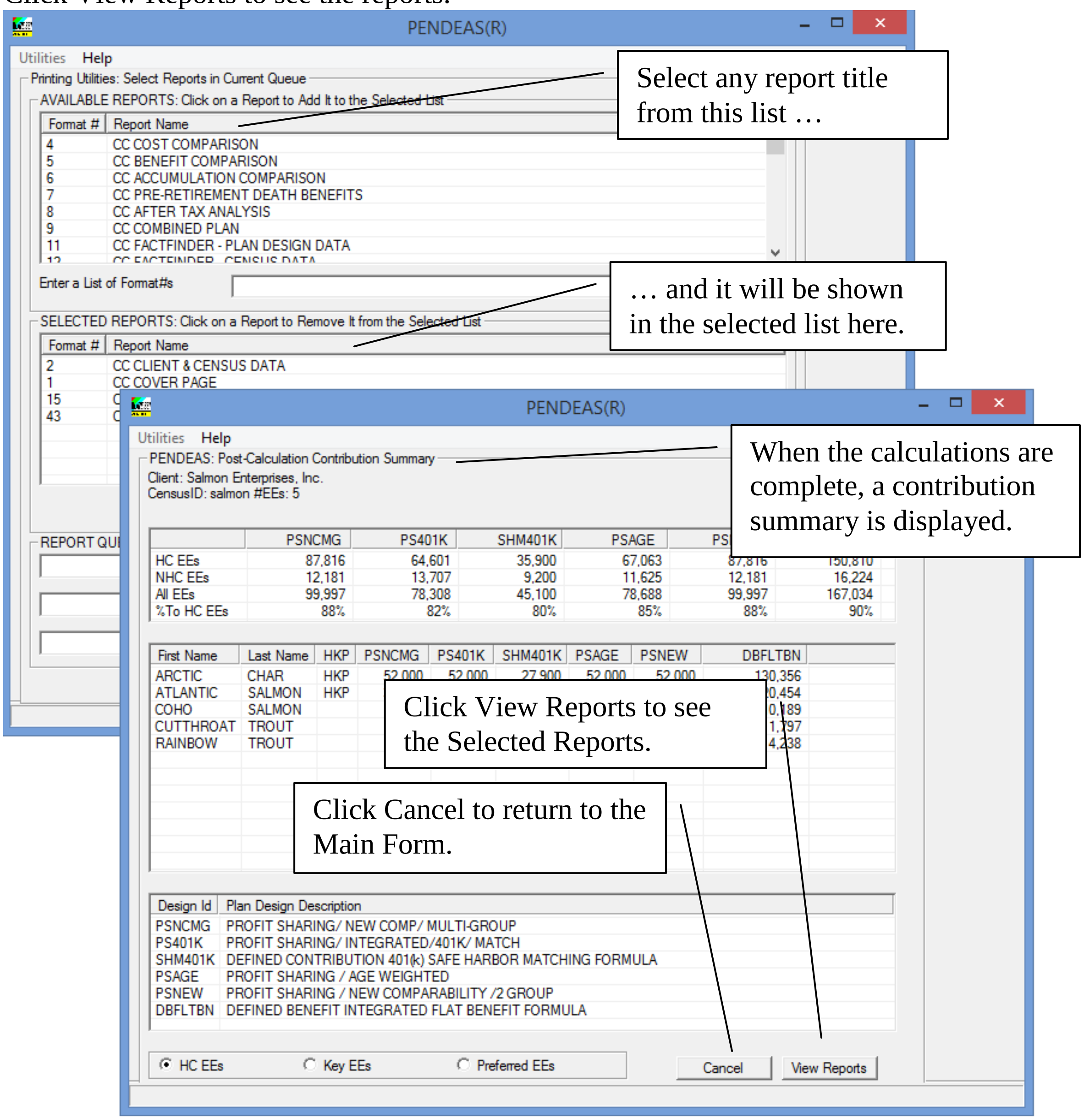


Reports: Select and Prepare Reports

Click Reports on the Main Form. Once the data has been entered and saved, click Reports to select and prepare reports. Click a report title in the Available Reports list and it will appear in the Selected Reports list, indicating that this report will be included in the illustration.

When you click OK, PENDEAS will validate input, perform calculations and show the Post-Calculation Contribution Summary. There are many time-saving functions related to report selection; see the BLAZE SSI Central Intro Guide for more information.

Click View Reports to see the reports.



Reports (continued)

Click View Reports on the Post-Calculation Contribution Summary. Use the Pre-print Questions form to make customizations to the reports, otherwise click OK.

An independent browser window opens to show the selected reports. Page through the pdf-format reports to see the full illustration. The reports may be saved, printed or emailed directly from this window.

The preparation of the illustration is complete.