

5-Part Compliance Training Series

Session 1: ERISA – Foundations and Plan Documents

- Introduction to ERISA
- Fiduciary Requirements
- Plan Document and SPD Requirements
- Wrap Documents
- Distribution of ERISA Documents

Session 2: ERISA and Form 5500

- Form 5500 Filings
- How Wrap Documents Impact Form 5500 Filings
- Due Dates and Extensions
- How to Handle Delinquent Filings

Session 3: Cafeteria & Pre-Tax Plans

- Premium Only Plans, HSA, FSA, DCA, HRA
- Mid-Year Election Changes
- Nondiscrimination Testing
 - Cafeteria Plans
 - Self-Funded Medical, Dental, and Vision Plans

Session 4: Essentials of COBRA Compliance

- Employers & Plans Subject to COBRA
- Qualifying Events
- Maximum Coverage Periods, Disability Extensions and Second Qualifying Events
- How COBRA is Impacted by Leaves of Absence, Severance Packages, Merger/Acquisition Activity, and Other Scenarios

Session 5: Affordable Care Act, HIPAA, and other Health & Welfare Plan Requirements

- ACA Compliance Requirements
- HIPAA Privacy & Security for Self-Funded Plans
- FMLA and Employee Benefits
- Avoiding Medicare Secondary Payer Mistakes

For information & scheduling, contact:

Derek Ashton, CEBS

dashton@medcombenefits.com

904-412-2702