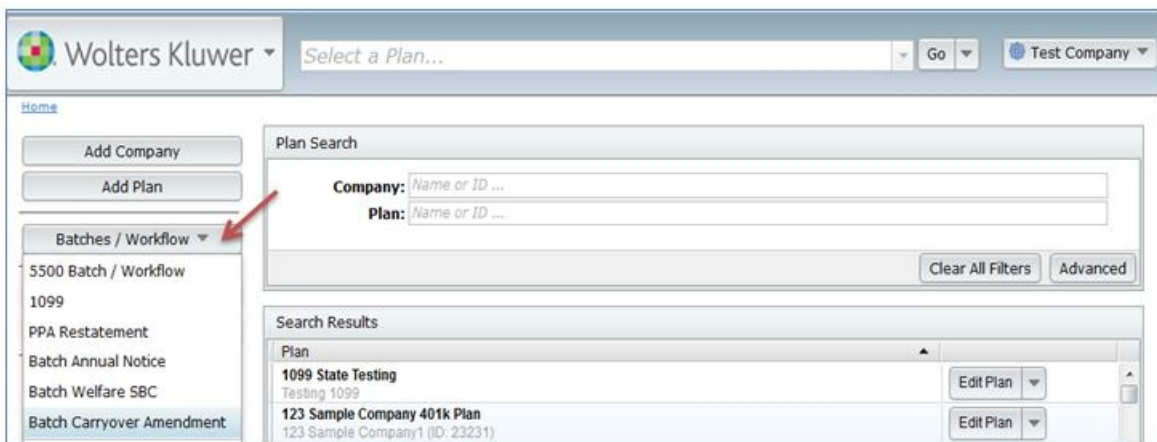


Document Batches

08/16/2024 4:06 pm CDT

The Batch feature permits you to print PPA Restatements, Annual Notices, Summary of Benefits and Coverage (SBCs) and Carryover Amendments for all of your clients in a few easy steps. **Note:** This feature is only available to Annual Document Subscribers.

To use the applicable batch feature(s), select from the applicable Batch in the drop-down ("PPA Restatement", "Batch Annual Notice", "Batch Welfare SBC" or "Batch Carryover Amendment") on the "Home" page under "Batches/Workflow".



You can also access the applicable feature(s) by clicking on the "Batch" link located in the "Forms" box on the "Print Plan Documents" page just to the right of the applicable link. For example, for a plan with Annual Notice features (safe harbor, auto-enrollment or QACA) to the right of the Annual Notice link; for welfare plans subject to HIPAA Portability, to the right of the SBC - Annual link.

