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Session 1: ERISA & Plan Documents

- Why Compliance is Important
- Introduction to ERISA
  - Fiduciary Requirements
  - Plan Document and SPD Requirements
  - Wrap Documents

Session 2: ERISA and Form 5500

- How to Distribute SPDs, Notices, and Related Documents
- Form 5500 Overview
  - How Wrap Documents Impact Form 5500 Filings
  - Form 5500 Due Dates and Extensions
  - The Summary Annual Report
  - How to Handle Delinquent Filings

Session 3: Tax-Advantaged and Account-Based Plans

- Tax Code Compliance Overview
- Cafeteria Plan Compliance
- Mid-Year Election Changes
- Nondiscrimination Testing Overview
  - NDT for Cafeteria Plans
  - NDT for Self-Funded Medical, Dental, and Vision Plans
- Overview of HSAs
- Overview of HRAs

Session 4: Essentials of COBRA Compliance

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

Session 5: ACA, HIPAA, and CAA

- ACA Compliance Requirements
- HIPAA Privacy & Security Rules for Self-Funded Plans
- Overview of Consolidated Appropriations Act Compliance
  - Transparency Rules
  - RxDC Reporting
  - Mental Health Parity Rules
  - Gag Clause Attestations

For information & scheduling, contact:
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