

Great Spirit Systems

2009 Year End / 2010 New Year Benefits Information For MissionBase Customers

December 15, 2009

Dear Friends:

Greetings! This document is my annual letter to benefits customers with information that is vital to closing 2009 and opening 2010. Please email Al Fifhouse (al@greatspirit.com) or me (bull@greatspirit.com) if you have any questions about the instructions and procedures below, or if anything does not appear to work correctly.

Before getting to the basic content of this communication, I want to thank all of you for your patience and support of Great Spirit Systems. We are heavily into our development efforts on "Falcon", the next evolution of our current MissionBase product. Consequently, we are only doing maintenance tasks on MissionBase and are not completing any new or custom development in MissionBase so we can direct most of our energies into Falcon. We hope that we will be able to transition some or all benefits customers into Falcon during 2011.

Some of you have downloaded the "demo" Falcon system, which consists of the "base" functions that are in MissionBase. Several of you have also given us valuable feedback. We appreciate the comments as they help us strengthen Falcon for everyone. If you haven't yet downloaded and installed the Falcon demo system, please consider doing so by going to:

<http://65.86.191.58/FalconInstall/badges.cfm>

Also, you may leave comments about Falcon at the "Falcon Talk" blog:

<http://www.greatspirit.com/blog/>

If you previously downloaded the Falcon demo, there have been several updates to it recently, and you may want to download an updated version to see the additions that have been made to the project.

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A. Cautionary Word:

Please do not start the January 2010 billing process until you have completed the processes described in the next section. This is an important set of procedures designed to be run only once each year.

B. Benefits Balance Forwards From 2009 to 2010:

A critical step in opening the new year is to bring balances forward into the new year. ***THERE ARE FOUR IMPORTANT ITEMS TO REMEMBER WHEN BRINGING FORWARD BALANCES:***

1. Only run the balance forward procedures once for each benefit type. Running them more than once will cause database integrity issues and should only be done if directed by GSS.
2. You should run the balance forwards **ON or AFTER** January 1, 2010.
3. You should only run the balance forwards **AFTER** you are certain that all December payments and adjustments have been posted. Failure to do so will result in incorrect balance forwards.
4. If you have run the balance forwards and then decide that you need to enter additional December transactions, you should enter **TWO** complete sets of transactions. One would be dated in 2009. Then you would enter an identical set of transactions dated in 2010. This approach is the preferred accounting method. Not following this process will result in the balance forwards being incorrect for some entities. In extreme cases where this is not feasible, please ask us to manually remove the balance forward batches so you can make the necessary transaction entries in 2009 only, and then you will run the balance forwards again.

The balance forward procedures are found as follows:

1. Click the "Benefits" button on the list bar at the left of the screen.
2. Click the "Tools" eagle button. You may need to scroll the list of eagle buttons to see the "Tools" eagle button.
3. After clicking the "Tools" eagle button, a number of forms will load on the right. Look for the "Benefits Balance Forward" form.
4. On the form, make sure the "Prior Year" box shows "2009" and the "Current Year" box shows "2010." If not, please enter the correct years.
5. Select the appropriate benefit type from the tree on the left.
6. If you want to preview the balance forwards before they actually post, click the "Preview Balance Forwards" button. This button will produce a report that will show you what the balance forwards will be for the new year. You can use the report to make any adjustments in case you notice some problems in the balance forwards. Then you can run the report again. NOTE: This report is also available in the reports tree. The preview step may be run as many times as needed.
7. Click the "Bring Balance Forward Into The New Year" button which will process the balance forwards for the specific benefit type selected in the tree. This step is to be run **ONLY ONCE!**
8. The progress will be reported in the progress bar and information label just above the progress bar.

All credit and debit balances will be carried forward, except for Missouri which has a customized process related to specific retiree categories where certain debit balances do not carry forward.

Note: The balance forward procedures may take some time to execute if your conference has a large number of transactions. Please be patient as the process must retrieve, verify, add together, and validate all 2009 invoices, payments, and adjustments for every participant and billing entity in your database to calculate the balance forward amounts. The more transactions in your system, the longer the balance forward process will take.

C. Special Information For CRSP/ CPP Billing Conferences:

CRSP/ CPP billing customers should verify their 2010 CRSP and CPP settings are entered. If you haven't entered the CRSP/ CPP settings, I encourage you to do so now. You may enter these settings at any time during the year when you have the information, for any year into the future. If you have entered them, you may want to verify them at your convenience. Note that making any changes to these factors, will change the figures on both the CRSP/ CPP participation form and compensation forms for the corresponding dates. That is especially important for you to consider if your districts use MissionBase as it will change what they see displayed for CRSP and/or CPP on the compensation form.

To enter the 2010 CRSP/ CPP factors:

1. Click the "Benefits" button on the list bar at the left of the screen.
2. Click the "CRSP/ CPP Settings" eagle button.
3. Click the "Add New Year" button at the bottom of the form.
4. To copy the 2009 settings into 2010, click the "Copy Most Recent Year CRSP Settings" button and/or the "Copy Most Recent Year CPP Settings."
5. At the top of the form, enter:
 - a. Start date, which should be 01/01/2010.
 - b. Stop date, which should be 12/31/2010.
 - c. The 2010 DAC, which is \$60,341.
 - d. The 2010 CAC specific to your conference.
6. Click the "Save" button.

To edit the 2010 CRSP/ CPP factors:

1. Click the "Benefits" button on the list bar at the left of the screen.
2. Click the "CRSP/ CPP Settings" eagle button.
3. Make sure "01/01/2010" is highlighted.
4. Examine the 2010 data and make any changes as needed.
5. If you make changes, click the "Save" button.

SPECIAL NOTE:

Several of you have reported to me that GBOPHB will not be billing CPP in 2010. Some of you are choosing not to bill CPP in 2010 and others plan to make some minor billing changes. If you have any questions on what your specific plans are on CPP for 2010 and haven't yet contacted me, please do so as soon as reasonable possible so I can go over the impact to MissionBase with you.

D. Special Information For Medical Insurance Billing Conferences:

You will need to enter your 2010 premium amounts **IF** your premium categories have not changed from 2009 to 2010. You may enter the 2010 premium amounts at any time **AFTER** you have printed the final statements for your December billing.

SPECIAL NOTES:

- The **Missouri and South Georgia** conferences should ***NOT*** complete this step as their 2010 premiums need to be set up by me since they are highly customized.

If any conference other than **Rocky Mountain** is changing premium structure, please contact me immediately.

To enter the 2010 premiums:

1. Click the benefits button on the list bar at the left of the screen.
2. Click the "MFL Settings" button.
3. On the right look for the premiums setting form. It will probably be the second form in the list.
4. Change the premiums in the grid as needed.
5. Click the "Save" button on the form. The premiums will be changed for all participants in your database with the exception of overridden premiums and other special cases. After you click the "Save" button and the premium updating is completed, a report will be printed providing you with a list of those participants whose premiums were not changed, and why. This report can then be used to manually change the premiums for those persons on the list.

Reminder: If you make any changes to a billing where **percent splits** are used, be sure to save the data twice, which forces a refresh of the percents in the database. If this is not done, it is possible that the billing will use the prior year percents.

E. Override Lists for Premiums and Billings:

Each conference has some overrides for premiums and/or billing amounts. These overrides are used in instances where your regular billing formulas or other special reasons don't apply to unique circumstances.

Note that when a person has a 2009 override set, the override billing amount will also be used in 2010 unless it is changed. In other words, since compensation will likely change on January 1 affecting CRSP and CPP, and since insurance premiums change, you may want to look at the list of overrides to see what changes need to be made before running your January billing cycle.

To get a list of overrides, you can go to any of the benefits reports trees. Look for the "Override List" report in the tree. If the tree has folders, it will be found in the "Other" folder. Note that UMPIP does not use the override concept at this time, so there is no override report in the UMPIP report tree.

F. Clergy Compensation Upload to GBOPHB:

Usually this is one of the two times during the year when clergy compensation changes need to be reported to GBOPHB. Significant changes have been made by GBOPHB to the file structure for uploading compensation and appointment changes for 2010. You will receive separate instructions about the uploading program in the near future.

G. Database Ready for 2010 Transactions:

Your database has already been prepared to receive 2010 transactions, so you can begin your January billing cycle when you are ready.

H. Important Items To Remember:

Here are some other important items for you to consider:

- ✓ **All Customers:** If you need to enter any 2009 transactions **AFTER** January 1, 2010, **make sure you use a 2009 date for those transactions!** For example, if you have a payment batch from December, 2009 to enter on January 3, 2010, make sure you use 12/31/2009 or some other 2009 date. If you fail to do this, the transactions will end up in 2010 business, throwing off both 2009 and 2010, requiring intervention by GSS to move the batch to the proper year.
- ✓ **CRSP/ CPP Billing Customers:** Make sure that you override both CRSP and CPP for district superintendents and clergy conference staff on the CRSP/ CPP form **AFTER** you have entered their 2010 compensation. Failure to override for these cases will mean that the January, 2010 billing will NOT automatically include them, or it will bill these persons at the 2009 rates. To do this, on the CRSP/ CPP Participation form, first set the "For Billing Date:" to the 1/1/2010. Then set the CRSP amounts and CPP amounts to bill with the new rates.
- ✓ **Flexible Benefits Customers:** Be sure to set the stop date for flexible benefits if you haven't already. Flexible benefits, by law, are only for one calendar year and must be elected each year by the participant. To stop the billing in 2009, you need to set stop dates for all participants. To set stop dates for all participants, you can use the tool for that purpose under "MFL Settings."
- ✓ **Flexible Benefits Customers:** After stop dates are set for all, then you will need to enter the flexible benefits elections for each participant and:
 - Change the start date to 2010. **NOTE:** Do **NOT** change the start date until **AFTER** your December statements have been run and printed.
 - Delete the stop date, or enter a 2010 stop date.

- Enter the proper election amounts for each benefit as needed.
- ✓ **All Customers:** Remember to connect with our web site www.greatspirit.com periodically to check for new items, support, etc. We periodically update the web site with new items, and are steadily adding support pages to the knowledge base to help answer your “how do I” questions or solve problems.
- ✓ **All Customers:** When setting a billing address, if the start date of the address *is greater than the billing date* the address will not be used. This is a very common error which results a many help requests, so if you are having this problem, be sure to check that the address start date is prior to or equal to the billing date before contacting GSS.

I. GSS Benefits Customers:

For your information, here is the list of our current benefits module customers:

Arkansas – Medical Insurance
East Ohio – CRSP/ CPP, medical Insurance, flexible benefits
Kansas East – CRSP/ CPP, medical insurance, HSA, vision insurance, dental insurance.
Kansas West – CRSP/ CPP, medical insurance, flexible benefits
Louisiana – CRSP/ CPP, medical insurance, flexible benefits
Minnesota – CRSP/ CPP, medical insurance
Missouri – CRSP/ CPP, medical insurance, flexible benefits
North Central New York – CRSP/ CPP
Nebraska – CRSP/ CPP, medical insurance, flexible benefits
New Mexico – CRSP/ CPP, medical insurance, flexible benefits, life insurance (BPP)
Northwest Texas – CRSP/ CPP, medical insurance, flexible benefits
Puerto Rico – CRSP/ CPP
Rocky Mountain -- CRSP/ CPP, medical insurance, flexible benefits
South Georgia – CRSP/ CPP, medical insurance, flexible benefits
Southwest Texas – CRSP/ CPP, UMPIP, medical insurance, flexible benefits, life insurance,
Medicare Part D
West Ohio – CRSP/ CPP, life insurance (BPP)
Wyoming (of NY and PA) – CRSP/ CPP, medical insurance, flexible benefits

J. Futuring ...

The benefits billing module will get a complete facelift in Falcon. In fact, most of it will change with an eye to being more “open” in design. An “open” design will allow for new benefits types, premium structure changes, billing entity control, etc. without GSS having to intervene and/or write highly specific customized code for each customer. At least that is my hope.

As mentioned at the beginning of this communication, please be sure to post your ideas, feedback, suggestions, and comments, we are to the GSS blog. This will be a place for you to contribute to the design of Falcon and help us to make a product more suited to your needs. The blog is located [on the GSS website \(http://www.greatspirit.com/blog/\)](http://www.greatspirit.com/blog/). We hope that you will take advantage of the blog regularly to see what others are saying about Falcon, to give your valuable “2 cents worth”, and to shape the future of Falcon.

Thank You!

Thank you for your continued confidence in Great Spirit Systems to provide your benefits billing system needs. Also, please remember that GSS offers several other modules for MissionBase in addition to benefits billing when your conference is looking for software to complete other functions. Some of those include Safe Sanctuaries, Event Registration (such as camps), Cabinet, church Statistics (Tables I, II, and III), and others.

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Please let Al or me know if you have any questions on any the above.

I hope your seasons of Advent and Christmas are blessed and that your New Year will be spiritually prosperous.

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