Below is the link to the Tuesday, March 8, 2016 UBA Employer Webinar Series: **"Plan Documents 101: Who Needs What and Best Practices"**

http://webinars.ubabenefits.com/WebinarRecordingGateway/tabid/2890/Default.aspx?rid=157195f8-3229-44be-8218-fe805839c708

Group health plans have a multitude of documents that need to be compliant with federal regulations. Cafeteria plans must have plan documents as well as documentation evidencing the adoption of the plan, and plans subject to ERISA need a plan document outlining the plan's terms for a number of items, including eligibility, benefits, exclusions, a named fiduciary and plan administrator, claims and appeals procedures, funding information, and other items. These requirements are separate from the summary plan description, or SPD, requirement that plans must also meet.

This webinar will help employers understand what plan documents they need, what the documents should contain, and the implications of using a "wrap document" to wrap the ERISA plan document and SPD requirements into one document.

This webinar will:

- Explain what a cafeteria plan document is, and what is required to be in the document
- Outline the supporting documentation every cafeteria plan should have regarding its adoption
- Explain what a plan document is for ERISA purposes and what is required to be in the document
- Explain the requirements for SPDs
- Discuss how wrap documents are used, along with the pros and cons of using a wrap document
- Provide best practices regarding regular review and updating of plan documents
- Discuss an employer's requirements when they update a plan, including Summary of Material Modification requirements
- Provide best practices regarding retention of plan documents and other recordkeeping requirements

This 90-minute beginner to intermediate level webinar will help employers understand the plan document requirements for group health plans.

PRESENTER

Monique Warren is a Principal in the White Plains, New York, office of Jackson Lewis P.C. She counsels employers on employee benefits compliance and administrative matters. Ms. Warren's expertise includes health and welfare plans as well as retirement plans. In addition to authoring many articles, Ms. Warren has been interviewed by and quoted in newspapers and periodicals, including *The Wall Street Journal*, and edits the firm's *Benefits Law Advisor* blog.

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Please feel free to watch/listen to this whenever it is convenient for you and your staff. It will be available for you to view for the next 11 months. Your name and email are required for registration. There is no cost however this webinar has been ***approved for 1.50 credit hours*** toward recertification through the HR Certification Institute. Once you have viewed the webinar, the last page will provide details on receiving the credit hour.