RPAG Tech Enhancements

RPAG 2023 Tech and System Enhancements

September 21, 2023

- Advisor Reports
  - New category to display “Number of Education Days” has been added to the Plan Demographics sub-report

September 7, 2023

- RFP Express
  - Users can now enter custom advisor names in RFP Express reports that display on the output
  - RFP Express now available for Start-Up 401(k) and Start-Up 401(k) Profit Sharing plans
  - Open Arch instant quotes are now available for inclusion in reports
- Batch Reporting
  - Strategy Equivalents have been added to batch reporting

August 24, 2023

- Batch Reporting
  - New report statuses have been added to more clearly indicate the progress of batch report processing
    - When a report is still being built, it will show as "In Progress" (no change)
    - As soon as the option to schedule a batch report and a schedule date have been selected and the report is within the queue, the status will show as “Scheduled”
    - Once the reports within a batch report are available to download, the status will show as “Generated”
- Strategy Equivalent
  - Strategy Equivalents have been added to the Summary of Considerations and the Considerations modules within the FIR

August 10, 2023

- My Fund Menu
  - Strategy Equivalents added to My Fund Menu main page, and to output reports generated within the tool
- Strategy Equivalents added to the following FIR report features:
  - Strategy Review
  - Considerations
  - Summary of Considerations

July 13, 2023

- Strategy Equivalents
  - Strategy equivalent disclosures have been added to Custom Models and Plan Allocation by Investment Type
  - Strategy equivalent scores are now included in the B3
  - Strategy equivalent checkbox option has been removed from the Considerations in the FIR report builder
- B3
  - ESG Rating report option is added to batch reporting

June 8, 2023

- Stable Value and GIC
  - Stable Value Fund Fact Sheets have been updated
    - " Queue as % of Assets” is added in Manage SV page, universal median page and in output report.
- Strategy Equivalents

- Asterisks added to strategy equivalents in fund look up,
- Asterisks added to strategy equivalents in FIR, B3, and RFP Express reports
- Style box Standard and Short will show strategy equivalent scores
- Total Cost Analysis will show strategy equivalent scores

June 1, 2023

- Strategy Equivalents
  - Strategy Equivalents have been added to the Style Box and Total Cost Analysis reports
- Rollover Analyzer
  - Company admins and RIA users now have the ability to access the new Rollover Analyzer Retrospective Review & Certification

May 11, 2023

- Formatting and text updated in the Scorecard
- Fund Lookup/Fund Research - Asset Class Review One Pager for flexPATH equivalent funds

April 13, 2023

- Option to include/exclude Strategy Equivalents has been added to standalone and larger reports, and to Find Lookup/Fund Research throughout the site; areas include:
  - Scorecard
  - Returns Analysis (with/without underlying funds)
  - ESG Ratings Report
  - Peer Group Analysis (with/without underlying funds)
  - Score History
- Strategy Equivalent logic has been implemented for the “My Fund Menu” and the “Provider Product” mapping options
- Quarterly Report has the option to include Strategy Equivalents has been added and the title page formatting has been redesigned.
- WellCents
  - Ability to add brackets which filter advisor visibility to participants scheduling meeting by various criteria (e.g., Age, Income, Outside Assets, etc.) has been added on the company level

March 30, 2023

- FIR/B3/Misc. Reports
  - Quarter identifiers added to current and previous reports to current and previous reports.
- WellCents
  - In progress meetings will now automatically end after 24 hours
- Service consultants dropdown filter has been added to the client list area
- RFP Express
  - Bidders selected on the compare quotes page will now automatically be included when creating reports
- Step 2 Considerations within the FIR will now display which mapping strategy the use has selected
- Client ID and Plan ID columns have been added throughout selected reports
- Fund Lookup/Fund Research - “Considered for Removal” has been renamed to “Under Review”
- Customize the order of attendees and have the option to include/exclude job titles within Meeting Agenda and Meeting Minutes
- Plan Design
  - Dollar amount/percentage toggle has been added to the employer match section
- Provider Analysis
  - Attachments may now be included when downloading provider cybersecurity reports
  - Meeting Agenda report feature now available
- Returns Analysis report feature now available in FPR

March 2, 2023

- Rollover Analyzer
  - RIA and BD selections have been added

- Total Plan Cost calculation has been changed to display correctly
- Plan Assets are no longer a required field

February 2, 2023

- Plan Design
  - Roth new feature
  - New plan type options now available for Individual 401(k) or Simple IRA Plus

January 19, 2023

- Plan Detail
  - New report titled “Quarterly Report” has been added to the scorecard.

January 5, 2023

- Plan Detail
  - Character limit has been expanded
  - New information icons
  - Scorecard button added to plan cards as a shortcut
- FIR
  - Users are now able to select a preferred address to display on the title page