





Carryover Amendment Batch Data Entry Grid Key

Column Name	Details	Checklist Location	Editable
Plan Name	Plan Name	A.2a and A.2b	No
Checklist	Welfare	N/A	No
Resp	Indicates whether you are responsible for the plan (default to Yes). Only plans that have “Yes” selected will appear. Options: <ul style="list-style-type: none"> • Yes • No 	Drop-down box on the ‘Edit Plan’ screen within the ‘Plan Modules’ box for “Plan Documents”.	No
Err Doc	Edit Check status for the plan. If one section of the document checklist (A-I) in ‘Not-OK’ or ‘??’, the system will show status of  (Not-OK).  = ‘??’ (edit checks have not yet been run);  = ‘OK’	Sections A-I	No
Err Forms	Edit Check status for the administrative portion of the checklist. If Section J is ‘Not-OK’ or ‘??’, system will show status of  (Not-OK).	Section J	No
Year End	Plan year end	A.4a	No
ExceptedBen	Excepted Benefits. Indicate the method of maintaining the Health Care Reimbursement Account as excepted benefits (only applicable if A.11 is “Yes”): <ul style="list-style-type: none"> • Group Health Coverage and Maximum Benefit • Limited Scope Benefits • Other 	C.5a.i. (Cafe Only)	Yes
ExceptedBenOther	If “Other” is selected in C.5a.i, describe:	C.5a.ii (Cafe Only)	Yes
ClaimGracePeriod	Grace Period. The Plan provides for a 2-1/2 month grace period described in IRS Notice 2005-42 immediately following the end of each Plan Year Options: <ul style="list-style-type: none"> • Yes • Yes – but limited to certain accounts • No 	D.3a (Cafe Only)	Yes
ClaimGracePeriodEffDate	If D.3a is not “No”, enter the first day of the first Plan Year for which the grace period will apply:	D.3b (Cafe Only)	Yes

ClaimGracePeriodAccounts	If D.3a is "Yes - but limited to certain Accounts", enter the Accounts that are eligible for the grace period:	D.3b (Cafe Only)	Yes
RevokeHours	Permit Participants to revoke an election of coverage under a group health plan due to reduction in hours of service Options: <ul style="list-style-type: none"> • Yes • No 	C.12b (Cafe) C.3b (POP)	Yes
RevokeQualHealthPlan	Permit Participants to revoke an election of coverage under a group health plan due to enrollment in a qualified health plan offered through a marketplace Options: <ul style="list-style-type: none"> • Yes • No 	C.12c (Cafe) C.3c (POP)	Yes
RevokeNonCalendar	Carryover Amendment Allow revocation /changes in election with respect to the accident and health plan once during the 2014 Plan Year and allow a prospective salary reduction election for accident and health coverage Options: <ul style="list-style-type: none"> • Yes • No 	J.17a	Yes
RevokeNonCalendarLimits	Indicate limits of the right to change/revoke elections (leave blank or type "none" if none apply):	J.17b	Yes
Carryover	Indicate whether the Plan will carryover unused Health Care Reimbursement Account balances at the end of the Plan Year as permitted in IRS Notice 2013-71.	D.4a (Cafe Only)	Yes
CarryoverAmt	Amount that may be carried over (no more than \$500)	D.4b (Cafe Only)	Yes
CarryoverDate	Effective date of the carryover option:	D.4c (Cafe Only)	Yes
CarryoverLimits	Describe any limitations on the carryover provision (leave blank or type "none" if none apply):	D.4d (Cafe Only)	Yes
CustomLanguage	Enter custom language that is to be added as an Addendum to the Adoption Agreement.	E.2	Yes
SPDCustomLanguage	Enter custom language to appear as an addendum to the Summary Plan Description:	J.100	Yes