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GOVFORMS®

BLAZE SSI GOVFORMS® SYSTEM 5500 SERIES FORMS

1. How do you install the BLAZE SSI GOVFORMS system?

- (a) The system comes to you on a Microsoft Windows format CD.
- (b) A simple installation instruction sheet is included with the CD.
- (c) GOVFORMS requires the installation of 4 components, which are included on the CD:
 - (1) BLAZE SSI-developed GOVFORMS software.
 - (2) Government-required EFAST form printing software.
 - (3) Government-required Microsoft .NET Framework 1.1
 - (4) Adobe Acrobat Approval software for graphical forms display.

2. Besides the 5500 forms, what else does the BLAZE SSI GOVFORMS system include?

- (a) A complete database to store the user-entered information for each form. If desired, you can use the ODBC interface to the Microsoft Access 2000 sample database that is included. When you edit a field on a specific page of the form that applies to other pages, the system automatically updates the information on the other pages of the forms.
- (b) Summary Annual Report, which is integrated with the forms.
- (c) Certain PBGC forms. The government does not provide EFAST services for these forms, but instead provides the “My PAA” web site for submitting electronic filings.
- (d) As an option, you may also license the GOVFORMS IRS 5300 forms series. The government does not provide EFAST services for these forms.

3. How do I get more information?

- (a) Visit the BLAZE SSI web site at www.blazessi.com to learn more about BLAZE SSI and other BLAZE SSI software products.
- (b) Contact BLAZE SSI with your questions or to license the system:
 - (1) Mail: BLAZE SSI Corp. Box 333 Brielle, NJ 08730-0333
 - (2) Fax: 732-223-5893
 - (3) E-mail: sales@blazessi.com
 - (4) Voice: 732-223-5575

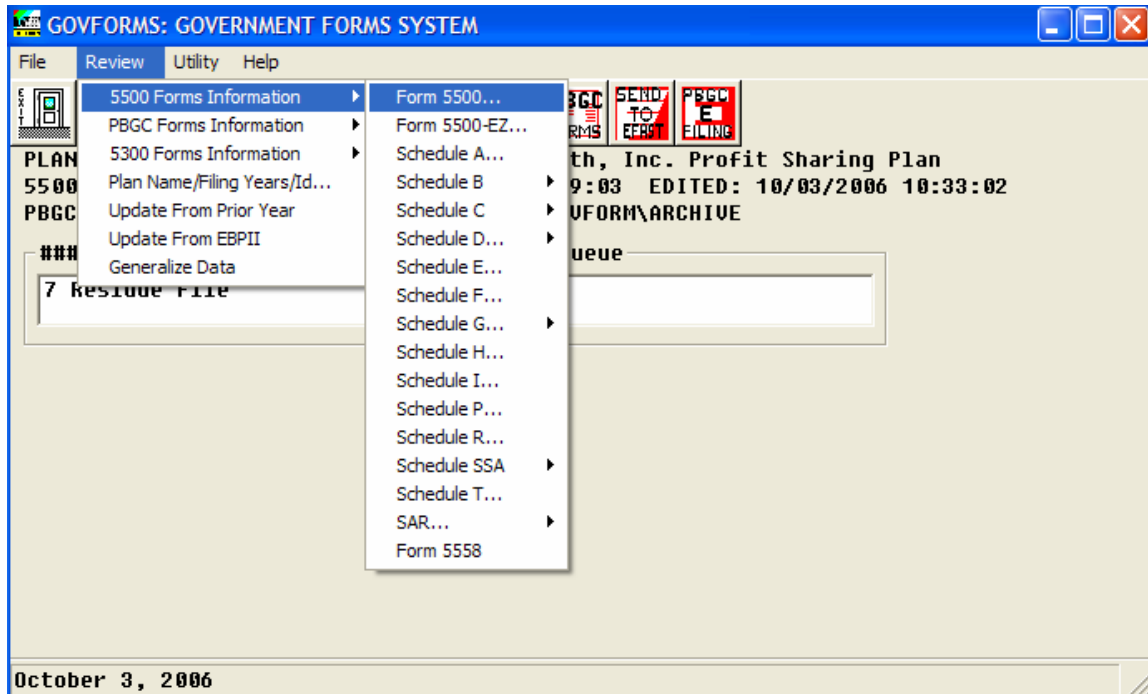
4. What is the typical workflow in GOVFORMS?

- (a) Use File > New> Initialize Values to install a new plan. Follow the system prompts, including entering the unique 1-7 character ‘plan id’ to be associated with the plan and the filing year for the 5500 and, if necessary, the PBGC forms.
- (b) Use the Review options to review and enter data for the form(s) you need (i.e. Review > 5500 Forms Information for the list of 5500 forms).
- (c) Use the CURRQ icon from the main screen to select the report(s) you wish to print (i.e. select report #1 for the 5500 forms for years prior to 2005).
- (d) Use the PRINTER icon from the main screen to print the selected report(s) to the printer. Select which report/pages you wish to print.
- (e) If you have completed the form(s) for the plan, use the SAVE AS icon from the main screen to save the plan data to the GOVFORM archive.
- (f) To begin entering data for the next plan, start with (a) above.
- (g) To work on a previously saved plan, use the OPEN icon from the main screen to ‘open’ the previously saved plan.

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5. How do you access the forms for review and edit in the system?

- (a) Start a work session of the BLAZE SSI GOVFORMS system using Windows Start > Programs > BLAZE SSI Applications > GOVFORMS or if desired a user-created Windows shortcut for the system.
- (b) All functions of the BLAZE SSI GOVFORMS system are menu driven, using the familiar Microsoft Windows navigation options.
- (c) From the main form of the BLAZE SSI GOVFORMS system use the Review > 5500 Forms Information to select the form to edit.



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6. What do the forms look like on screen?

- The form is graphically displayed on the screen almost exactly as it would be printed.
- (a) The data entry fields are sensitive to the government-defined data type, including text fields, check boxes, lists of permissible codes, etc.
 - (b) Blank 'white space' on the edges of the form is cropped out to increase legibility of the form and reduce scrolling time between pages.
 - (c) There is a 'Reset' button on the first page of the form to initialize all form answers.
 - (d) When appropriate there is a 'Calc' button on the first page of the form to force or inhibit calculations. This is useful for users who partially complete the forms and use the partially completed forms to gather the missing information from the plan sponsor.
 - (e) The government-required bar codes are printed only on the hard-copy forms.
 - (f) There are (?) help notes that clarify potentially confusing areas of the government-designed forms.
 - (g) The user can view a 'navigation pane' which provides links to the government-provided documentation, if any, for each form line.

GOVFORMS: GOVERNMENT FORMS SYSTEM

Help

Save a Copy Print Email Search Review & Comment Sign

Select Text 106%

RESET **Validation Enabled**

Form **5500-EZ** **Annual Return of One-Participant (Owners and Their Spouses) Retirement Plan**

Official Use Only
OMB No. 1545-0956
2007
This Form is Open to Public Inspection

Department of the Treasury
Internal Revenue Service

This form is required to be filed under section 6058(a) of the Internal Revenue Code.
Complete all entries in accordance with the instructions to the Form 5500-EZ.

Part I Annual Report Identification Information

For the calendar plan year 2006 or fiscal plan year beginning **01/01/2007** and ending **12/31/2007**

A This return/report is: (1) the first return filed for the plan; (3) the final return filed for the plan;
(2) an amended return; (4) a short plan year return (less than 12 months).

B If you filed for an extension of time to file, check the box and attach a copy of the extension application

Part II Basic Plan Information -- enter all requested information.

1a Name of plan
2007 PATS CASE-01

1b Three-digit plan number (PN) **001**

1c Date plan first became effective (mo., day, yr.)
11/01/1999

2a Plan employer's name and address (Address should include room or suite no.)
XJEANS!!! SERVICES
PROFIT SHARING PLAN
2847 PERSIMON LANE
WISTERIA ST **WI** ZIP **54123**

2b Employer Identification Number (EIN) (Do not enter your Social Security Number)
39-1052353

2c Employer's telephone number
(920) 829-355

2d Business code (see instructions)
561730

3a Plan administrator's name and address (if same as plan employer, enter "Same")
SAME

3b Administrator's EIN

3c Administrator's telephone number



7.99 x 8.16 in 1 of 14

Tab or Enter is required after editing a field value to assure capture!

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7. What do the forms look like when printed?

- (a) Forms are printed by the government-developed EFAST software.
- (b) The user can customize the header and footer of the form page, if desired.
- (c) When printing a form for submission to the government (EFAST) the BLAZE SSI GOVFORMS system will cause the EFAST printing software to include a special '2D barcode' on the form. This bar code contains all the user-entered information and the government vendor certification code provided to BLAZE SSI.

<p>Form 5500</p> <p>Department of the Treasury Internal Revenue Service</p> <p>Department of Labor Employee Benefits Security Administration</p> <p>Pension Benefit Guaranty Corporation</p>	<p>Annual Return/Report of Employee Benefit Plan</p> <p>This form is required to be filed under sections 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA) and sections 6047(e), 6057(b), and 6058(a) of the Internal Revenue Code (the Code).</p> <p>▶ Complete all entries in accordance with the instructions to the Form 5500.</p>	<p align="center"><small>Official Use Only</small> OMB Nos. 1210-0110 1210-0088</p> <p align="center">2007</p> <p align="center">This Form is Open to Public Inspection.</p>
Part I Annual Report Identification Information		
For the calendar plan year 2007 or fiscal plan year beginning <u>01/01/2007</u> , and ending <u>12/31/2007</u> ,		
A This return/report is for: (1) <input type="checkbox"/> a multiemployer plan; (3) <input type="checkbox"/> a multiple-employer plan; or (2) <input checked="" type="checkbox"/> a single-employer plan (other than a multiple-employer plan); (4) <input type="checkbox"/> a DFE (specify) _____		
B This return/report is: (1) <input checked="" type="checkbox"/> the first return/report filed for the plan; (3) <input type="checkbox"/> the final return/report filed for the plan; (2) <input type="checkbox"/> an amended return/report; (4) <input type="checkbox"/> a short plan year return/report (less than 12 months).		
C If the plan is a collectively-bargained plan, check here <input type="checkbox"/>		
D If filing under an extension of time or the DFVC program, check box and attach required information. (see instructions). <input type="checkbox"/>		
Part II Basic Plan Information — enter all requested information.		
1a Name of plan 2007 PATS CASE-01	1b Three-digit plan number (PN) ▶	001
	1c Effective date of plan (mo., day, yr.)	11/01/1999
2a Plan sponsor's name and address (employer, if for a single-employer plan) (Address should include room or suite no.) XJEANS!!! SERVICES PROFIT SHARING PLAN 2847 PERSIMON LANE WISTERIA WI 54123	2b Employer Identification Number (EIN)	39-1052353
	2c Sponsor's telephone number	92-082-9355
	2d Business code (see instructions)	561730
<p>Caution: A penalty for the late or incomplete filing of this return/report will be assessed unless reasonable cause is established.</p> <p><small>Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as the electronic version of this return/report if it is being filed electronically, and to the best of my knowledge and belief, it is true, correct and complete.</small></p>		
SIGN HERE		JOHN J GREENJEANS
Signature of plan administrator	Date	Type or print name of individual signing as plan administrator
SIGN HERE		JOHN J GREENJEANS
Signature of employer/plan sponsor/DFE	Date	Type or print name of individual signing as employer, plan sponsor or DFE
<p>For Paperwork Reduction Act Notice and OMB Control Numbers, see the instructions for Form 5500. v10.1 Form 5500 (2007)</p>		
		
<p>0 2 0 7 3 3 0 1 0 G</p> 		

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8. What type of user documentation is provided?

- (a) A documentation report format is provided so that the user can select all, part or recently modified system documentation for hard-copy printing.
- (b) For every line of every 5500 Series form, there is an on-screen link to the government documentation, if any, for that line.
- (c) For the potentially confusing areas of the government-designed forms, BLAZE SSI has added on-screen (?) help notes to clarify these data entry items.
- (d) All the government-provided documentation for the EFAST form printing software is provided.
- (e) All the Adobe-provided documentation for the Acrobat software is provided.

This is an example of the notes tool help:

The screenshot shows the BLAZE SSI GOVFORMS SYSTEM interface for Form 5500, 'Annual Return/Report of Employee Benefit Plan'. The interface includes a toolbar with 'Save a Copy', 'Print', 'Email', 'Search', 'Review & Comment', and 'Sign'. The form itself has sections for 'Part I Annual Report Identification Information' and 'Part II Basic Plan Information'. A yellow callout box highlights a help note for field 4: 'Enter the date in the format 'mm/dd/ccyy' (i.e., 02/01/2002). Note that the plan year beginning and ending dates may be left blank if the plan year is equal to the calendar year.' The form is partially filled with data like '2007 PATS CASE-01' and 'JEANSIII SERVICES'. The status bar at the bottom indicates 'Tab or Enter is required after editing a field value to assure capture!'.

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This is an example of the IRS instructions that may be viewed on screen:

The screenshot displays a web browser window titled "GOVFORMS: GOVERNMENT FORMS SYSTEM". The interface includes a menu bar with options like "Save a Copy", "Print", "Email", "Search", "Review & Comment", and "Sign". Below the menu is a toolbar with various navigation and editing tools. The main content area shows the "2007 Instructions for Schedule B (Form 5500) Actuarial Information". The text is organized into sections: "General Instructions", "Who Must File", "Statement by Enrolled Actuary", and "Attachments". A status bar at the bottom indicates "8.5 x 11 in" and "6 of 14". A footer message reads: "Tab or Enter is required after editing a field value to assure capture!".

2007 Instructions for Schedule B (Form 5500) Actuarial Information

General Instructions

Who Must File

The employer or plan administrator of a defined benefit plan that is subject to the minimum funding standards (see Code section 412 and Part 3 of Title I of ERISA) must complete this schedule as an attachment to the Form 5500.

Note. The Schedule B does not have to be filed with the Form 5500-EZ (in accordance with the instructions for Form 5500-EZ under the "What To File" section); however, the funding standard account for the plan must continue to be maintained, even if the Schedule B is not filed.

If a money purchase defined contribution plan (including a target benefit plan) has received a waiver of the minimum funding standard, and the waiver is currently being amortized, lines 3, 9, and 10 of Schedule B must be completed. The Schedule B must be attached to Form 5500 but it need not be signed by an enrolled actuary.

Check the Schedule B box on the Form 5500 (Part II, line 10a(2)) if a Schedule B is attached to the Form 5500.

Lines A through E and G (most recent enrollment number) must be completed for ALL plans. If the Schedule B is attached to a Form 5500, lines A, B, C, and D should include the same information as reported in Part II of the Form 5500. You may abbreviate the plan name (if necessary) to fit in the space provided.

Do not use a social security number in line D in lieu of an EIN. The Schedule B and its attachments are open to public inspection if filed with a Form 5500, and the contents are public information and are subject to publication on the Internet. Because of privacy concerns, the inclusion of a social security number on this Schedule B or any of its attachments may result in the rejection of the filing.

EINs may be obtained by applying for one on Form SS-4, Application for Employer Identification Number, as soon as possible. You can obtain Form SS-4 by calling

attachment. (3) For terminating plans, Rev. Rul. 79-237, 1979-2 C.B. 190, provides that minimum funding standards apply until the end of the plan year that includes the termination date. Accordingly, the Schedule B is not required to be filed for any later plan year. However, if a termination fails to occur — whether because assets remain in the plan's related trust (see Rev. Rul. 89-87, 1989-2 C.B. 81) or for any other reason (e.g., the PBGC issues a notice of noncompliance pursuant to 29 CFR section 4041.31 for a standard termination) — there is no termination date, and therefore, minimum funding standards continue to apply and a Schedule B continues to be required. (4) The Pension Protection Act of 2006 provides funding relief for certain defined benefit plans (other than multiemployer plans) maintained by a commercial passenger airline or by an employer whose principal business is providing catering services to a commercial passenger airline, based on an alternative 17-year funding schedule. For plans utilizing this relief, please see the Special Instructions on page 31.

Statement by Enrolled Actuary

An enrolled actuary must sign Schedule B. The signature of the enrolled actuary may be qualified to state that it is subject to attached qualifications. See Treasury Regulation section 301.6059-1(d) for permitted qualifications. If the actuary has not fully reflected any final or temporary regulation, revenue ruling, or notice promulgated under the statute in completing the Schedule B, check the box on the last line of page 1. If this box is checked, indicate on an attachment whether an accumulated funding deficiency or a contribution that is not wholly deductible would result if the actuary had fully reflected such regulation, revenue ruling, or notice, and label this attachment "**Schedule B – Statement by Enrolled Actuary.**" A stamped or machine produced signature is not acceptable. The most recent enrollment number must be entered in line G. In addition, the actuary may offer any other comments related to the information contained in Schedule B.

Attachments

All attachments to the Schedule B must be properly identified, and must include the name of the plan, plan sponsor's EIN, and plan number. Put "Schedule B" and the line item to which the schedule relates at the top of each attachment. When assembling the package for filing, you can place attachments for a schedule either directly behind that schedule or at the end of the filing.

8.5 x 11 in 6 of 14

Tab or Enter is required after editing a field value to assure capture!

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9. How do I print 5500 Forms?

Printing of 5500 forms is performed in a separate processing ‘thread’ using the government-developed EFAST Bridge program. The BLAZE SSI software quickly creates an EFAST BRIDGE-compatible output file (.efx) which the user can print in the ‘background’ using the EFAST Bridge program. The printing process is independent of the BLAZE SSI software so the user’s ongoing activities with the BLAZE SSI software are not restricted or delayed by the EFAST printing process.

The EFAST Bridge software is used when printing the 5500 forms and schedules. Prior to printing any 5500 forms, the EFAST Bridge application for the applicable filing year must be installed (see installation instructions provided by BLAZE SSI Corp.). Since the GOVFORMS system will create an .efx file that will be processed by the EFAST Bridge program, it is recommended that a specific folder be created for each GOVFORMS user to contain these files (for example, the GOVFORMS workfiles subdirectory). Using the EFAST Bridge ‘Watch’ Mode operation (see Section 9.2 below), .efx files that are created through the GOVFORMS Utility > 5500 Forms to EFAST menu option will be automatically processed by EFAST Bridge and printed to the selected printer in the background. In this way, the GOVFORMS 5500 Forms to EFAST operation concludes very rapidly, allowing for further GOVFORMS system operation, while the EFAST Bridge application completes the printing operation in the ‘background’.

The printing of 2007 5500 forms begins by starting the EFAST Bridge application by either:

- (a) Windows menu: navigation to Start/Programs Menu/Vangent/EFASTBridge2007_20.exe
- (b) Double click on EFASTBridge2007_20.exe desktop icon

9.1 EFAST Bridge Operation – Manual Tab

When the EFAST Bridge application opens, the following screen will be seen: This is the Manual Operation tab. This mode of operation does not provide for background printing of forms. Therefore, it is recommended that the user select the *Watch* tab, and follow the instructions in **Section 9.2**.

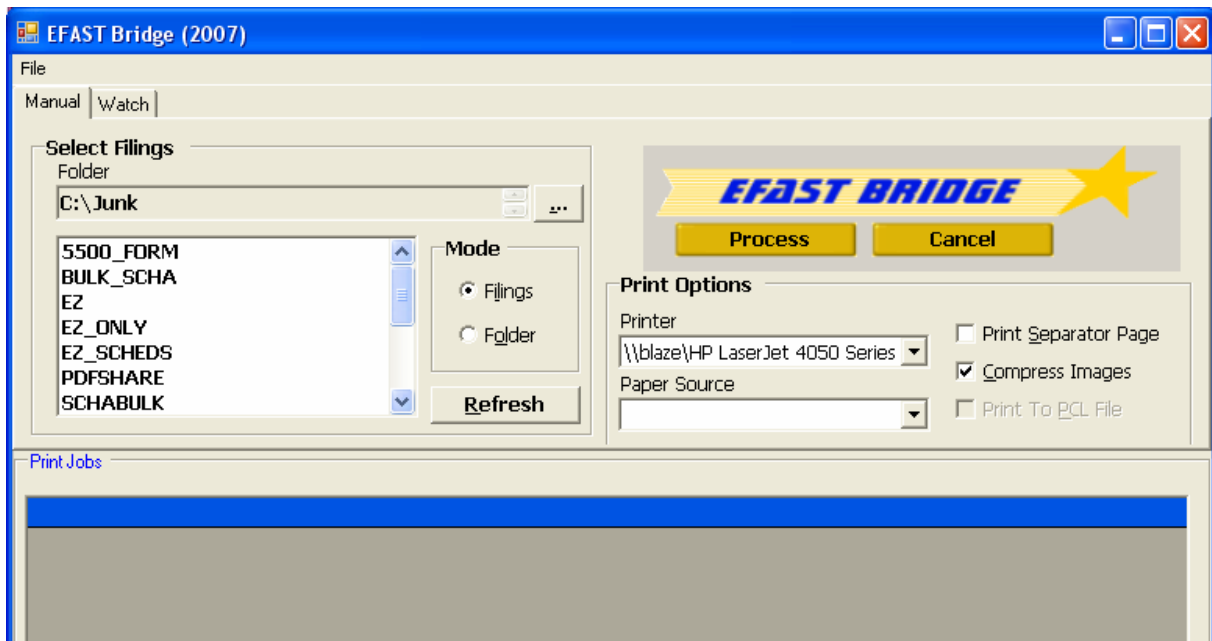


Figure 9-1 - EFAST Bridge User Interface – Manual Mode Tab Displayed

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9.2 EFAST Bridge Operation – Watch Tab

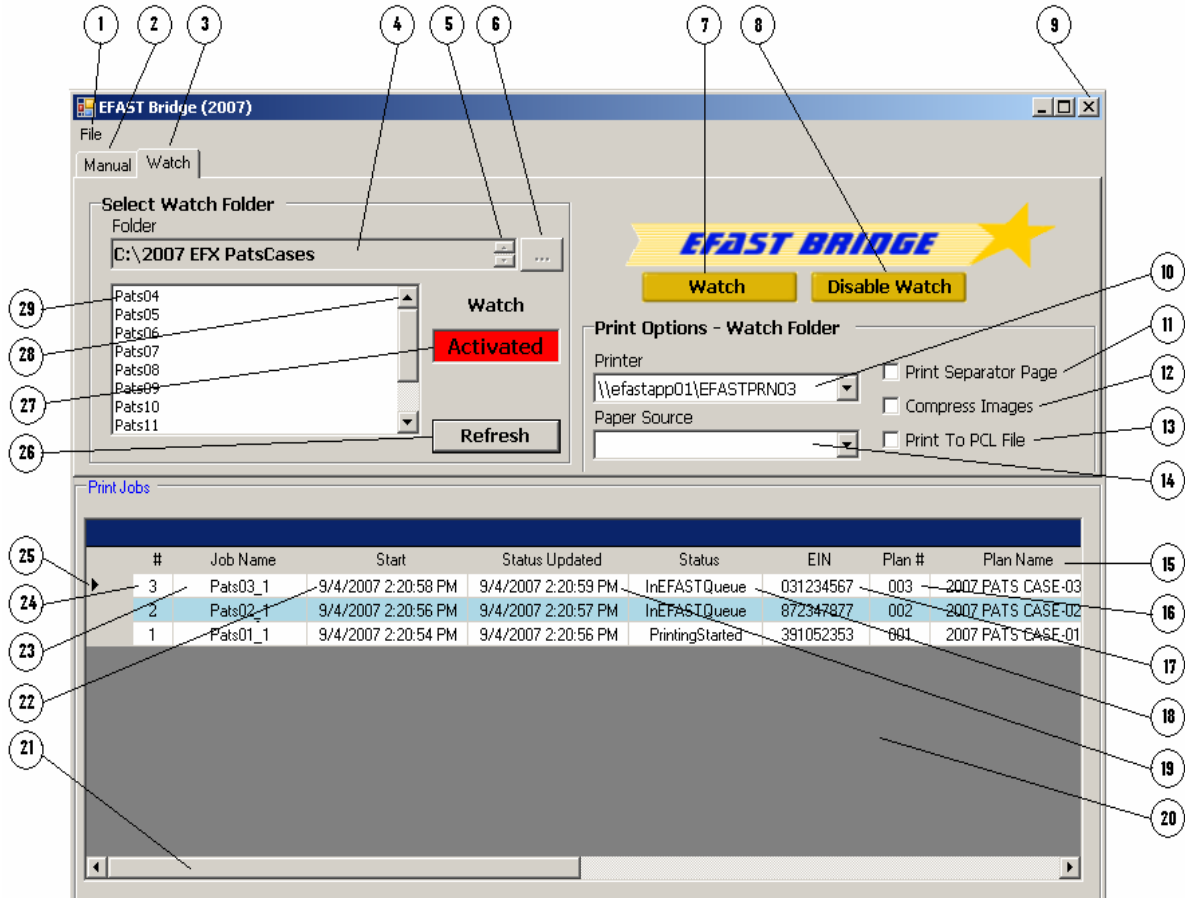


Figure 9-2 - EFAST Bridge User Interface – Watch Mode Tab Displayed

Listed below is a description of each of the call out items shown in Figure 9-2:

- | | |
|---|---|
| 1. The <i>File</i> pull down menu | 15. The print job plan name column |
| 2. The <i>Manual</i> operation tab | 16. The print job plan number column |
| 3. The <i>Watch</i> operation tab | 17. The print job EIN column |
| 4. The watch folder text box | 18. The print job status column |
| 5. Watch folder text box scroll button | 19. The print job status updated column |
| 6. The browse for watch mode folder command button | 20. The print jobs status grid |
| 7. The activate <i>Watch Mode</i> command button | 21. The print job status updated column |
| 8. The disable <i>Watch Mode</i> command button | 22. The print job grid row selector |
| 9. The application <i>Close</i> box | 23. The print job number column |
| 10. The select printer drop down list box | 24. The print job name column |
| 11. The print separator page between print jobs check box | 25. The print job grid row selector |
| 12. The RLE compress images check box | 26. The refresh EFX file list in EFX files to process list box command button |
| 13. The Print to PCL File check box | 27. The Watch Mode activated/disabled text box |
| 14. The select paper tray drop down list box | 28. The EFX files to process scroll bar |
| | 29. The EFX files to process list box |

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The *Watch Mode* operation is accessed by selecting the *Watch* tab. In *Watch Mode* operation, a watch mode folder is selected by the user. All EFX files that appear in the watch mode folder are automatically processed by EFAST Bridge when watch mode is activated. When EFAST Bridge finishes processing an EFX file, it changes the extension on the file to DON. If an EFX file is processed with errors, the extension is changed to ERR. EFAST Bridge supports simultaneous watch mod and manual mode operation.

To select the watch mode folder, the user clicks on the command button labeled with the ellipsis in Figure 9-2 (call out 6). A standard folder selection dialog appears. The user then selects the desired watch folder. The user selected watch mode folder appears in the watch mode text box (call out 4).

All EFX files currently located in the watch mode folder appear in the *Watch Mode Files to Process* list box (call out 29). After the EFX files in the watch mode folder are processed and the extension of the files renamed to DON or ERR, they are removed from the *Watch Mode Files to Process* list box.

To avoid an error message when printing to certain printers, BLAZE SSI recommends checking the *Compress Images* box (call out 12).

To activate the watch mode, the user clicks on the *Watch* command button (call out 7). The text in the *Watch Mode State* text box (call out 27) is set to “Activated”. The background of the *Watch Mode State* text box turns red to highlight the fact that watch mode is activated. When watch mode is activated, EFAST Bridge scans the watch mode directory every two seconds for EFX files to process.

To disable the *Watch Mode*, the user clicks on the *Disable Watch* command button (call out 8). The text in the *Watch Mode State* text box reverts to “Disabled”.

10. Which Adobe Acrobat features are activated for forms editing?

The Adobe Acrobat program is activated from within a BLAZE SSI application-specific form using the Microsoft ActiveX standard. Only those Adobe Acrobat features that Adobe makes available via the ActiveX standard are provided in this environment.

During review/edit of the form, users have access to several features that are available through the Adobe interface. These include:

- (a) The ability to print from the form (without the need to go through the GOVFORMS printing option).
 - (1) The PBGC forms can be printed directly from the Adobe Acrobat dialog. Be sure to check the 'Print as Image' option on the print dialog which is presented when you click the Adobe Acrobat toolbar print button. Failure to check the 'Print as Image' option may result in a form with dimensions which are not acceptable to the PBCG scanning process.
 - (2) The 5500 series forms can be printed directly from the Adobe Acrobat dialog, **however they cannot be submitted to the EFAST program.**

To print 5500 series forms which can be submitted to the EFAST program, close the Adobe Acrobat dialog and use the BLAZE SSI-provided Report Queue and Print option to select and print the desired 5500 series form or schedules. Using the BLAZE SSI-provided Print option causes the system to use the DOL/PWBA/EFAST Print Control.

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Using the government-provided software assures that the form dimensions and the required 'bar codes' will be printed.

(3) When printing directly from the Adobe Acrobat dialog, using the Adobe toolbar print button will present a dialog that allows the selection of any page or pages of the form and/or instructions.

- (b) Direct access to the Form instructions. Pages that follow the form contain the government- provided instructions for the specific form.
- (c) A 'Find' icon to search the form and instructions.
- (d) Zoom-in and zoom-out controls as well as other viewing options, such as 'fit width' which adjusts the viewing so that the entire width of the form is viewable.
- (e) A navigation panel containing BLAZE SSI-created bookmarks to take the user to each applicable section of the instructions.
- (f) The Adobe toolbar 'save' button saves the user-entered information and a copy of the associated .pdf file in Adobe Acrobat format. This format is not directly used by the BLAZE SSI GOVFORM application system.

To save the user-entered information associated with the .pdf form presented to the BLAZE SSI GOVFORM database, exit the Adobe Acrobat dialog and use the BLAZE SSI-provided Save option.