

Assigning Admins to a Plan

07/31/2024 11:25 am CDT

Only Master Admin Users or Designated Admins can assign admins to plans for various modules.

Individual Plan Update

Admins and responsibility fields may be updated on the Edit Plan screen of individual plans, by selecting the name from the dropdown directly below each module:

Home > Edit Company > Edit Plan

Plan Notes Help

Company:	A. Demo Corp	ID:	a.demo
Plan:	A. Demo 401(k) Plan	ID:	a.demo plan
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST		
Details:	EIN: 86-7530932 • PN: 117 • PYE: 12-31		

Plan Menu

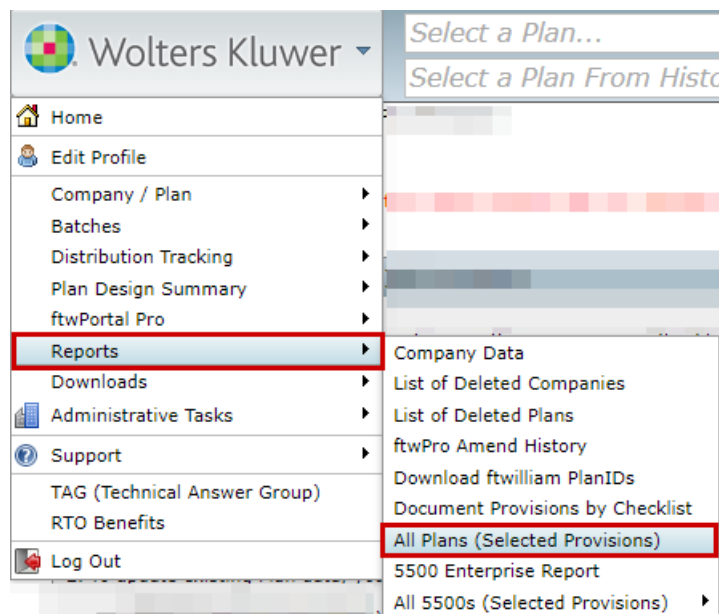
- Convert Plan
- Clone Plan
- Delete Plan
- Show History
- Document History
- MEP/PEP Options
- Post PPA Reference Guide

Plan Modules

Plan Documents	IRS Forms	5500 Forms	1099-R	Compliance	Portal	Proposal	Plan Design	Distributions
2023	2023							
Yes	Yes	Yes	Yes	Yes	Yes		Yes	No
AlexisR	AlexisR	DavidR	AlexisR	DavidR			JohnnyR	JohnnyR

Mass Import

To update admin and responsibility fields via mass import, download the 'All Plans Selected Provisions' report under the Wolters Kluwer logo> Reports.



This report includes details about the companies and plans within the account and contains the necessary details for importing admins and responsibilities. Scroll to columns T-AJ to view plan names, numbers, and associated admins or responsibilities. Update the Admin module and 'RespForPlan' fields as needed.

Note: The upload feature only adds or modifies entries; it does not remove users or responsibilities if a field is

deleted.

Example: Updating the spreadsheet for the Documents, IRS Forms, and 5500 Module:

	T	U	V	W	X	Y	Z	AA	AB	AC
1	PlanLine1	PlanLine2	PlanNumber	PlanID	DocAdmin	RespForPlan	IRSAdmin	IRSRespForPlan	Work5500Admin	Work5500RespForPlan
2	ACA Example Plan		2		AlexisR	Yes	DavidR	Yes		Yes
3	Shinra Electric Power Company		1		AlexisR	Yes	AlexisR	No	AlexisR	No

Once the spreadsheet is completed, select the Upload Company/ Plan data on the Home screen> Add/Modify Company and Plan Data.



On the next screen select the top link 'Add/Modify Company and Plan Data'. which will redirect to the screen shown below. Choose the file and select the 'Submit' Button.

The system will not perform data integrity edits on uploaded data. Be sure you run all appropriate edit checks after performing the import.

Upload Company and Plan Information

The add/modify Company/Plan data options on this page are very flexible and there are several ways to approach this function depending upon what you want to accomplish.

In general, the schemas on this page and the reports available from the Wolters Kluwer button can be combined and modified in numerous different ways. Here are a few important rules to keep in mind:

1. To update existing Company data, you must include at least one of the following fields that match a Company you administer on the FTW system:

- CustomerID (customer-assigned value)
- CompanyEmployerID (Employer's EIN)
- FTWCustomerID (can be found by clicking on "Download Document Schemas" > "Download ftwilliam.com plan IDs" report)

2. To update existing Plan data, you must include at least one of the following fields for each plan to identify an existing Plan on the FTW system:

- PlanID (customer-assigned value)
- PlanNumber along with one of the company identifiers above
- FTWPlanID (can be found by clicking on "Download Document Schemas" > "Download ftwilliam.com plan IDs" report)

Note that Plan Name and Company Name are not used for identification purposes.

You can create a spreadsheet using the appropriate schema found by clicking on "Download Document Schemas". Note that you do not need to repeat company data on subsequent lines when adding multiple plans to the same company, as shown in the sample spreadsheet below. Any column that does not contain data will use the default value from the appropriate ZZZ default plan. Any columns which could not be mapped to an appropriate ftwilliam.com column (e.g. incorrect spelling) will be ignored and will be displayed on the confirmation page.

After clicking 'Submit' you will be shown a preview of the changes that will take place after performing the import, as well as warnings and errors you can click on for more information. For Company/Plan updates only data changes will appear. For new Companies/Plans, all accepted data from the CSV will be shown. Click 'Perform Upload' to complete the upload of data.

Below is a link to a sample spreadsheet. In this example, the sample spreadsheet will add two companies and three plans. The sample plans will override the variables listed in the spreadsheet and use the ZZZ defaults for the remaining variables not displayed.

[Sample Spreadsheet](#)

This upload can also be used to replace existing Company/Plan data in batch.

For a video demonstration outlining a method to update existing company and plan data, [click here](#).

[Outline and notes to accompany demo](#)

[EGTRRA Plan Simple Upload Sample](#)

Sample Schema Files

[Download Document Schemas](#)

Upload file name:

Choose File

AllPlansSele...sions (27).csv

Number of rows before column headers:

0

Submit

Cancel

Once the file has been submitted, a confirmation screen will populate for users to review the information and confirm the import. Nothing will be altered in the account until the 'Perform Upload' button has been selected. **Please review this screen thoroughly.**

Below are the different views of what to anticipate based on the details on the spreadsheet. These are in reference to adding new plans or updating existing plans.

ADDED:

The following is an example of an upload where plans were added to the software. If **ADDING** companies or plans review the highlighted sections.

Upload Results Preview

#	Result	Company	Plan	CompanyName	CustomerID	CompanyEmployerID	PlanLine1	PlanLine2	PlanNumber	PlanID	DocA
1	OK		Add				ACA Example Plan				
2	Warning		Add				Shinra Electric Power Company				

[Download as CSV](#)

Total rows processed/received:	2 / 2
Total rows with companies to be added:	0
Total rows with companies to be updated:	0
Total rows with plans to be added:	2
Total rows with plans to be updated:	0

Total errors:	0
Total warnings:	1

Headers not recognized:

Division

Perform Upload

Cancel

UPDATED:

The following is an example of an upload where updates to plans were made. If **UPDATING** companies or plans review the highlighted sections.

Upload Results Preview

#	Result	Company	Plan	CompanyName	CustomerID	CompanyEmployerID	PlanLine1	PlanLine2	PlanNumber	PlanID	DocAdmin	IRSAdmin
1	Warning		Update									
2	OK		Update								-> AlexisR	
3	OK		Update									
4	OK		Update									

[Download as CSV](#)

Total rows processed/received:	4 / 4
Total rows with companies to be added:	0
Total rows with companies to be updated:	0
Total rows with plans to be added:	0
Total rows with plans to be updated:	4

Total errors:	0
Total warnings:	1

Headers not recognized:

Division

Perform Upload

Cancel