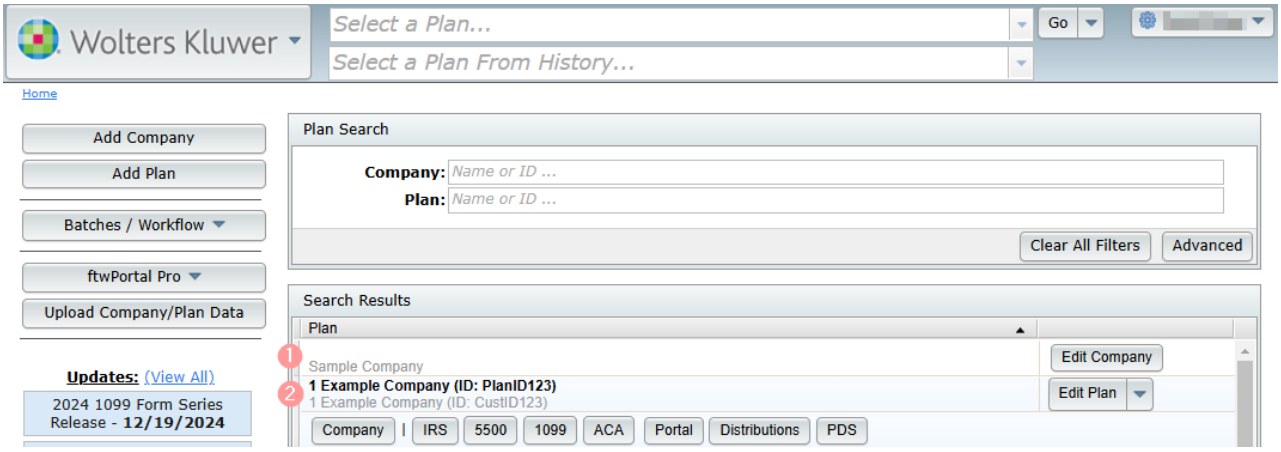
Edit Company

12/19/2024 2:10 pm CST

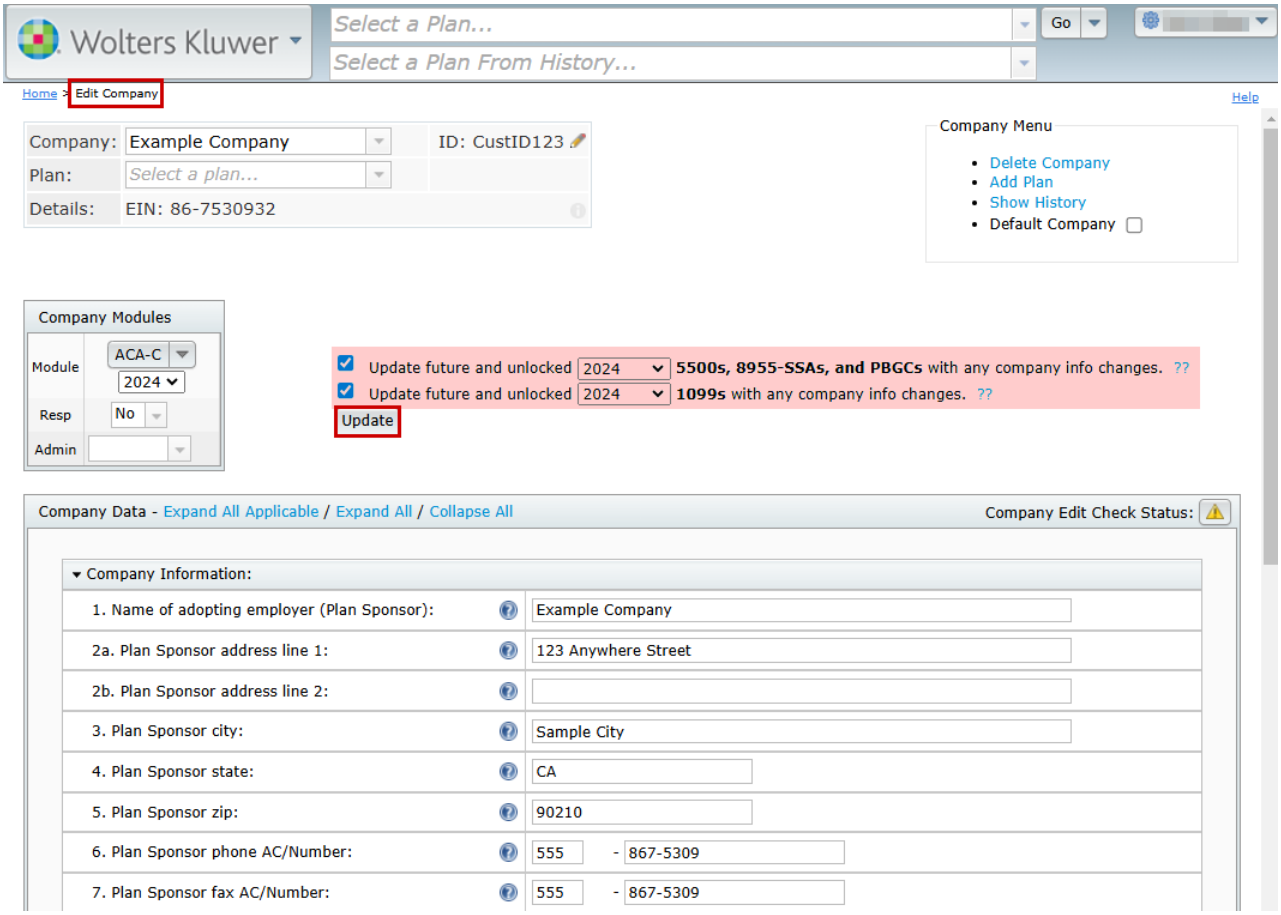
From the "Home" screen, select a Company or Plan to access the "Edit Company" screen, purchased modules, or the "Edit Plan" screen. First-time users will need to add a Company and Plan before proceeding. The available plan types depend on the subscriptions with ftwilliam.com.

1. Listings that only show the "Edit Company" button do not have any associated plans, as seen in the 'Sample Company' example in the screenshot below.

2. Clicking on a plan name will expand its details, displaying quick-access buttons for the available modules.



Users can update Company/Sponsor information (including company/sponsor name, address, etc.) on the Edit Company page. On this page, there is also a box at the top of the page that will also update any future and *unlocked* 5500s and 8955-SSAs or 1099s with updated company/sponsor data for a particular filing year. Be sure to click on "Update" after checking the box to ensure the changes are reflected correctly.


Wolters Kluwer
Select a Plan...
Go
Select a Plan From History...
Home > Edit Company
Help
Company: Example Company
ID: CustID123
Plan: Select a plan...
Details: EIN: 86-7530932
Company Menu
Delete Company
Add Plan
Show History
Default Company
Company Modules
Module ACA-C
2024
Resp No
Admin
Update future and unlocked 2024 5500s, 8955-SSAs, and PBGCs with any company info changes. ??
Update future and unlocked 2024 1099s with any company info changes. ??
Update
Company Data - Expand All Applicable / Expand All / Collapse All
Company Edit Check Status:
Company Information:
1. Name of adopting employer (Plan Sponsor): Example Company
2a. Plan Sponsor address line 1: 123 Anywhere Street
2b. Plan Sponsor address line 2:
3. Plan Sponsor city: Sample City
4. Plan Sponsor state: CA
5. Plan Sponsor zip: 90210
6. Plan Sponsor phone AC/Number: 555 - 867-5309
7. Plan Sponsor fax AC/Number: 555 - 867-5309