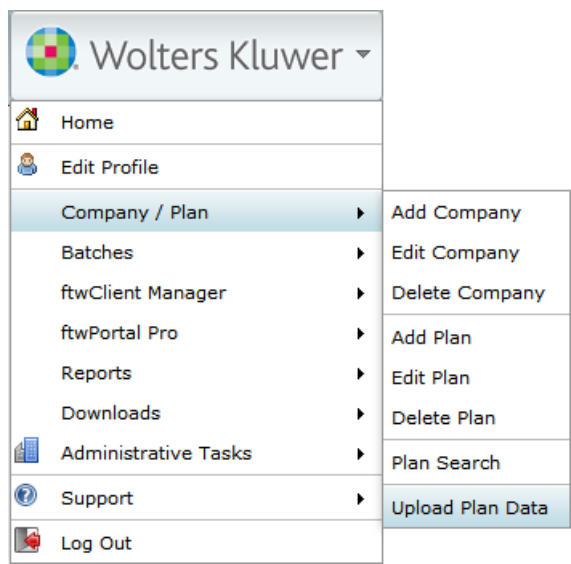


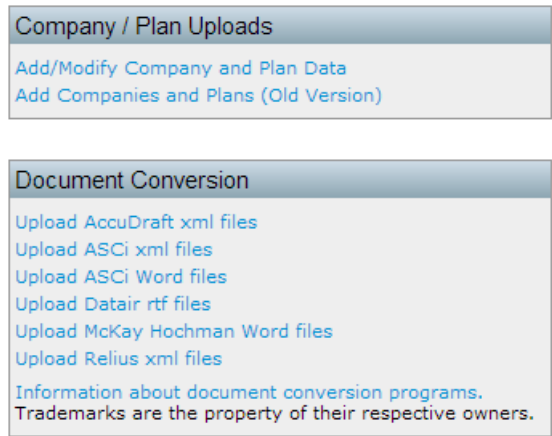
Upload Menu

08/16/2024 4:38 pm CDT

You can upload a variety of different file types to add or update plans and companies to your ftwilliam.com account. You can use this feature if you are converting your data to ftwilliam.com from another software vendor, or to use a .csv file to import new plan data or update existing plan information. To view the available upload file format options, click the Wolters Kluwer logo button in the top left corner, select **Company/Plan**, then click **Upload Plan Data**.



In the Upload Center, you will see a list of available file type uploads from other software vendors. If you have a file from one of the listed vendors, simply click the link for the respective files type to upload, and [see these instructions](#).



If you have plan data stored in a .csv file, you can use the **Add/Modify Company and Plan Data** features to create your own upload. Additionally, by uploading plan data in a .csv you may update existing plans or add new plans.

Upload Menu

The plan upload enables you to upload data for any plan type for existing plans, or to add new plans, as well as add and update company/sponsor information. The Upload Menu features a list of all the available plan and company schemas which list columns you can include in the upload on the right. Click **Download** to see a .csv that lists all of

the acceptable column headers/fields along with data types that may be accepted for the listed plan type.

Upload Company and Plan Information

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

Sample Spreadsheet

This sample spreadsheet will add a company and 2 plans. The sample plans use most of the ZZZ default plan options, only overriding the appropriate elements.

You will need to create a spreadsheet using the appropriate schema located on the right side of this page. Note that you do not need to repeat company data on subsequent lines when adding multiple plans to the same company, as shown in this example. Any column which is not specified, will use the 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. 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 commit the changes.

Upload file name: No file selected.

Number of rows before column headers:

Select Division:

[Cancel](#)

Description	Checklist	Plan Type	Schema
Company			Download
Prototype Non-Standardized 401(k)	ProtoNS	4K	Download
Prototype Non-Standardized Money Purchase	ProtoNS	MP	Download
Prototype Non-Standardized Target Benefit	ProtoNS	TG	Download
Prototype Standardized 401(k)	ProtoSTD	4K	Download
Prototype Standardized Money Purchase	ProtoSTD	MP	Download
Volume Submitter 401(k)	VolSub	4K	Download
Volume Submitter Profit Sharing	VolSub	PS	Download
Volume Submitter Money Purchase	VolSub	MP	Download
Volume Submitter 401(k) (Prototype Format)	VolSub	4KPT	Download
Volume Submitter 401(k) (Prototype Format)	VolSub	4KPT	Download
Defined Benefit Pension Plan (Proto Format)	DefBen	DB	Download
Defined Benefit Pension Plan (ID Format)	DefBen	DBID	Download
Cash Balance Plan (Proto Format)	DefBen	CB	Download
Cash Balance Plan (ID Format)	DefBen	CBID	Download
Employee Stock Ownership Plan	ESOP	PS	Download
Employee Stock Ownership Plan 401(k)	ESOP	4K	Download
Section 403(b) Plan (Full Scope)	403B	4B	Download
Section 403(b) Plan (Limited Scope)	403B	4BL	Download
Cafeteria Plan	Welfare	Cafe	Download
Premium Only Plan	Welfare	POP	Download
Health Reimbursement Arrangement	Welfare	HRA	Download
Trans Spend Acct	Welfare	132	Download
Wrap Plan	Welfare	WRAP	Download
Section 457(b) Plan	NonQual	457B	Download
Section 409A Plan	NonQual	409A	Download
Tax-Exempt 457(b) Plan	TIAA	457BTEND	Download
Governmental 457(b) Plan	TIAA	457BGOVT	Download
Misc (1099, 5500 or Admin Software)	Misc	WL	Download

[Download ftwilliam.com plan IDs](#)