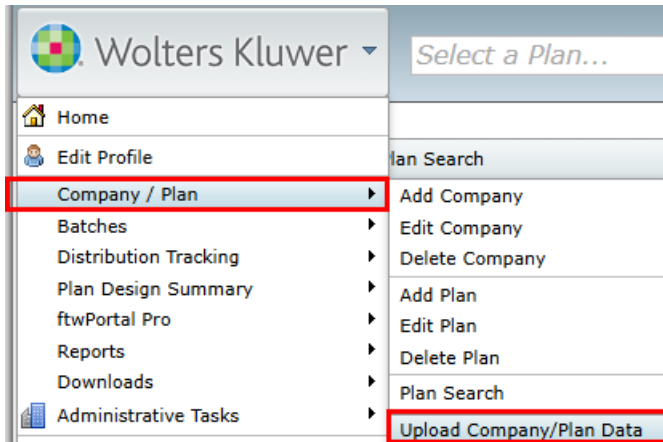


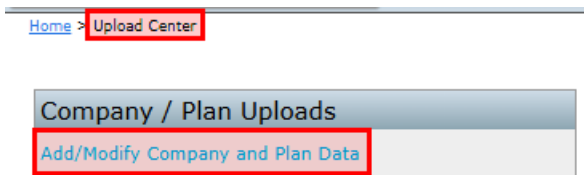
Upload Center

04/15/2026 9:57 am CDT

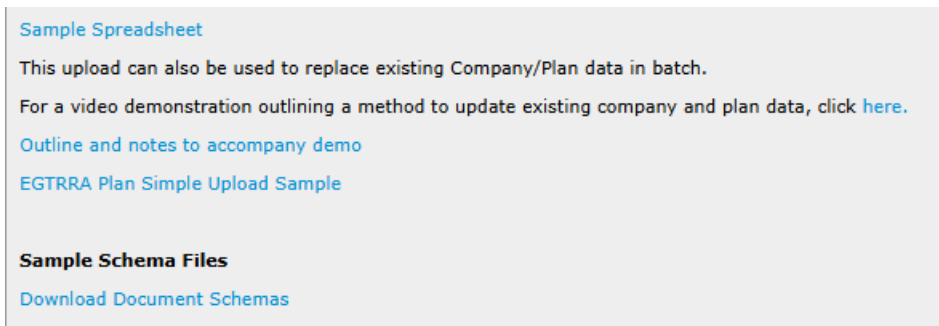
You can access the Upload Center from the Wolters Kluwer drop-down menu, select Company/Plan, followed by Upload Company/Plan Data.



Add/Modify Company and Plan Data - this link can be used to create your own upload to update existing plans or add new plans.



The following page, Upload Company and Plan Information, offers several files that allow you to add or update companies or plans. Additionally, it outlines specific requirements that must be fulfilled to ensure a successful upload.



Sample Spreadsheet - provides an example of uploading two new companies and three plans. Where there are no values listed in a column, the software will use what is in the ZZZ-Default for the applicable plan checklist type.

Outline and notes to accompany demo - downloads an instruction document to follow with the demo video.

EGTRRA Plan Simple Upload Sample - provides a CSV file of only EGTRRA checklist types for you to upload to your

account.

Download Document Schemas - provides a link to download all available plan and company schemas to choose from.

Document Conversion - To upload a file in answers-only format from another software vendor, click the relevant link.

Document Conversion

- [Upload AccuDraft xml files](#)
- [Upload ASCi xml files](#)
- [Upload ASCi Word files](#)
- [Upload Relius xml files](#)

[Information about document conversion programs.](#)
Trademarks are the property of their respective owners.

If you currently, or have previously, used the 5500 or 1099 software module an additional step may be needed prior to uploading your plan document data. You may need to convert your plans from the Misc type to the plan document checklist type required for your document data prior to performing the document conversion. Failure to complete this step may lead to duplicate plans on the system one with your document information and one with your 5500/1099 information instead of them being combined under the same plan.
