

Adding New Companies and Plans

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Each file upload requires identifying information for the plan or company you would like to create through the file upload. To add companies or plans to ftwilliam.com, you must include the value `CompanyName`.

If you are adding a new plan to the system, you must include the following fields to identify the plan's sponsor:

- An existing `ftwCustomerID` or `CustomerID` or `CompanyEmployerID` (EIN)
- `PlanLine1`
- Valid Checklist and `PlanType` combination as listed on the Upload Menu

If you are adding a company and a plan in the same row of a .csv upload, you must include the `CompanyName` field for the new company you are creating.
