

# Bring forward (prior year) data to (current year) for all plans

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This will bring data forward any schedules that existed in the prior year but not in the current year, so existing schedules will not be overwritten.

In addition, if you click on the option to "Bring forward (prior year) data to (current year) for all plans", the following warning will appear in a pop-up window:

The screenshot shows a web browser window with the following elements:

- Browser Header:** Wolters Kluwer logo and navigation menu (Home > Edit Company > Edit Plan > 5500 > 2022 > 5500).
- Main Content:** "5500 Batch/Workflow" section with a list of options. The option "Bring forward 2021 data to 2022 for all plans" is highlighted in red.
- Pop-up Window:** A warning dialog box with the following text:
  - www.ftwilliam.com says
  - By clicking 'OK', you will copy all Form 5500 information from 2021 to 2022 for ALL plans.
  - Press 'Cancel' to abort.
  - It may take from several seconds to several minutes to transfer all information. A blank screen may appear while the transfer is taking place. You will know the transfer is complete when transfer statistics appear in the blank screen. Please note that locked plans will not import prior year data. Data already present in a given plan will not be overwritten.
  - While the transfer is taking place:
    - Do NOT click on the 'Bring forward' link again.
    - Do NOT close or refresh ANY browser window.
  - Buttons: "OK" (highlighted with a red box) and "Cancel".

When you are ready, click on "OK" to proceed. It may take a few minutes to process. Once the process is complete, you will be brought to the "Bring forward Form 5500 data to (current year)" screen with results shown indicating the number of forms updated.