Document Batches

08/16/2024 4:06 pm CDT

The Batch feature permits you to print PPA Restatements, Annual Notices, Summary of Benefits and Coverage (SBCs) and Carryover Amendments for all of your clients in a few easy steps. **Note:** This feature is only available to Annual Document Subscribers.

To use the applicable batch feature(s), select from the applicable Batch in the drop-down ("PPA Restatement", "Batch Annual Notice", "Batch Welfare SBC" or "Batch Carryover Amendment") on the "Home" page under "Batches/Workflow".

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| Add Company | Plan Search | |
| Add Plan | Company: Name or ID | |
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| 5500 Batch / Workflow | | Clear All Filters Advanced |
| 099 Search Results | | |
| Batch Annual Notice | Plan | |
| Batch Welfare SBC | 1099 State Testing Testing 1099 | Edit Plan 👻 |
| Batch Carryover Amendment | 123 Sample Company 401k Plan 123 Sample Company1 (ID: 23231) | Edit Plan 💌 |

You can also access the applicable feature(s) by clicking on the "Batch" link located in the "Forms" box on the "Print Plan Documents" page just to the right of the applicable link. For example, for a plan with Annual Notice features (safe harbor, auto-enrollment or QACA) to the right of the Annual Notice link; for welfare plans subject to HIPAA Portability, to the right of the SBC - Annual link.

| Plan Document Adoption Agreement Download Basic Plan Document | | Summary Plan Description Summary Plan Description | Forms Annual Notice (Batch Deferral Agreement (|
|---|---------------------------------|---|---|
| Documents | / Forms | | Sylect All / Des |
| | | | View Plan Docs Demo Video |
| Details: | EIN: 11-2323232 • PN: 001 • PYE | : December 31 | Global Document Print Settings 1 |
| Checklist: | Prototype Standardized 401(k |) - EGTRRA | ftwPro Amend E-Signed Docs Document Format: Word Word Print IRS Letter for This Plan (Other Plans) |
| Plan: | Test Company, LLC 401K Plan | - ID: 🖋 | |
| Company: | Test Company, LLC | ID: 🖋 | Plan Documents Menu |