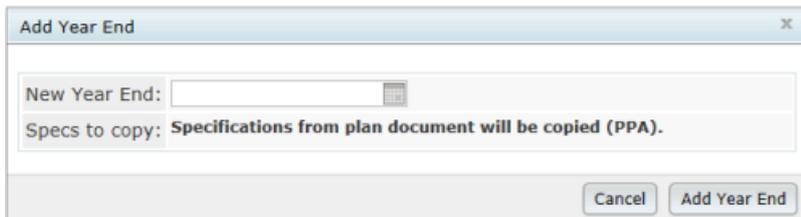# 2.2. Subsequent Plan Year on the ftw Compliance system

10/29/2024 1:43 pm CDT

Once you press the "Compliance" button for a plan, you will be taken to the Compliance page where the system will have the "Add Year End" box ready for you to enter the first plan year end you want to work on. After entering the plan year end into the text box or selecting the year end from the Calendar tool, click on "Add Year End".

When adding the very first plan year end, the software will copy plan specifications from the plan document, if it's on ftwilliam.com. If not then the software will use the default provisions for whatever document type you selected. You can customize one or more default plans for the Compliance system. To do this, on the Home screen enter ZZZ - Default Plans in the company search field. Choose a plan type from the resulting list, typically the document type that you use most often. Click "Edit Plan"; you can now enter your plan provisions section by section. Once you have done this, any plan you add of that document type will default to the provisions you entered. You can add additional default plans for other document types that you use.

For the first year you use the system, you will need to setup plan specifications. Once these are set, you will not have to set them up in future years unless there are changes to the plan document specifications. See the Use of the system for the first testing year section for more assistance with using the system for the first time.