## 2.3 Batch Add Plan Year End

08/19/2025 2:49 pm CDT

Batch adding new plan year ends for subsequent years is done by selecting "Tools/Settings" > "Batch Add Plan Year End" from the Compliance Tasks web page. This option will bring up a pop up box to enter the new plan year end.

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After selecting the year you wish to add, click on "Add Year End".

atch Add Yea	r End
12/31/2016	
Cancel	Add Year End

A window with the list of plans available to be rolled forward will appear. Note: Only plans with an existing prior year end will be included in the list. Ex. Plan has a 12/31/2015 PYE and no 12/31/2016 PYE. You selected 12/31/2016. The plan will appear on the list for 12/31/2016.

Depending on the history in the system, you will be given the option to copy specifications from a prior year end using Compliance specifications or, if the document is on ftwilliam.com, from the Plan Document checklist specifications. The default on the batch level is the prior plan year end Compliance specifications. You have the ability to filter/sort the list by Company Name, Plan Name 1, Plan Name 2, Specs to Bring Forward, \*Resp and \*\*Admin (Based on the entries on the Edit Plan page - screenshot below). You can select all plans or choose which plans to roll forward based on your filters and sort options.

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You have the ability to export the list you have chosen in a .csv. The link is in the lower right hand corner of the "Batch

## Add Year End" window.

1	Company Name	Plan Name 1	Plan Name 2		Specs to Bring Forward	Resp	Admin	0
	Company Name	Plan Name 1	Plan Name 2	New Year End	Specs to Bring Forward	Resp	Admin	
	Premium Live Co	US2470		12/31/2016	12/31/2015	Yes		
	Premium Live Co	US2702		12/31/2016	12/31/2015	es		
3	Premium Live Co	U\$3639		12/31/2016	ftwilliam Plan Document System	res		
3	Premium Live Co	US4151		12/31/2016	12/31/2015	Yes		
1	Premium Live Co	US4345		12/31/2016	12/31/2015	Yes		

Once you are ready to proceed, select the "Do with Selected" button and a drop down will appear with the option to "Bring Forward Info" or "Change columns". The change columns option currently only contains the ability to change plan specs for all the selected plans. However, it has been designed this way so more options can be made available in the future.

	Company Name	Plan Name 1	Plan Name 2		Specs to Bring Forward	Resp	Admin	
U.	Company Name	Plan Name 1	Plan Name 2	New Year End	Specs to Bring Forward	Resp	Admin	
22	Premium Live Co	US2470		12/31/2016	12/31/2015	Yes		
22	Premium Live Co	U52702		12/31/2016	12/31/2015	Yes		
2	Premium Live Co	US3639		12/31/2016	12/31/2015	Yes		
22	Premium Live Co	US4151		12/31/2016	12/31/2015	Yes		
8	Premium Live Co	US4345		12/31/2016	12/31/2015	Yes		
								_

When selecting "Change columns", a pop up box will appear.

Column	New Value	
Specs to Bring Forward		*

Be sure to select the check box next to "Specs to Bring Forward" and then select the value you wish to replace for the batch from the drop down for the option.

Chang	ge Columns - 5 selected	Show Selected X
	Column	New Value
2	Specs to Bring Forward	-
		12/31/2015
		ftwilliam Plan Document System

At this point you have the ability to display a list of the plans you have chosen by clicking on the "Show Selected" link in

## the upper right corner.

Sele	ected Items - 5 selected	х
1	US2470	
2	U\$2702	
3	U\$3639	
4	US4151	
5	US4345	

Select "OK" to proceed or "Cancel" to be returned to the "Batch Add Year End" window.

3	Column	New Value
1	Specs to Bring Forward	ftwilliam Plan Document System

You will see a "Confirm Change" pop up. Select "Yes" to make the change or "No" to be returned to the "Change Columns" pop up.

^	Are you sure you want to update	e 1 column in each of 5 rows with the following informati
!\	Column	New Value
	Specs to Bring Forward	ftwilliam Plan Document System

You will be returned to the "Batch Add Year End" window. From here, select "Bring Forward Info".

	Company Name	Plan Name 1	Plan Name 2		Specs to Bring Forward	Resp	Admin	
G.	Company Name	Plan Name 1	Plan Name 2	New Year End	Specs to Bring Forward	Resp	Admin	
2	Premium Live Co	US2470		12/31/2016	ftwilliam Plan Document System	Yes		
2	Premium Live Co	U52702		12/31/2016	ftwilliam Plan Document System	Yes		
2	Premium Live Co	U\$3639		12/31/2016	ftwilliam Plan Document System	Yes		
2	Premium Live Co	US4151		12/31/2016	ftwilliam Plan Document System	Yes		
8	Premium Live Co	US4345	1	12/31/2016	fowilliam Plan Document System	Yes		
					and an end of the			

A pop up will appear to confirm your choice.

Plans being brought forward: 5 selected items	Show Selected X
Add new plan year for these plans?	
	Cancel Confirm

At this point you have the ability to display a list of the plans you have chosen by clicking on the "Show Selected" link in the upper right corner.

Sele	ected Items - 5 selected	ж
1	US2470	
2	U\$2702	
3	US3639	
4	US4151	
5	US4345	

Select "Confirm" to proceed. You will be returned to the "Compliance Tasks" web page. From here select "Compliance" from the breadcrumbs at the top of the screen and you can go to any of the plans you have selected to view the newly added year end OR to view all added plan years, you can select "Tools/Settings" > "Workflow" from the Compliance Tasks web page.

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Details:	Details: EIN: 762234567 • PN: 001 • PYE: December 31			Transactions			
Year End:	Year End: 12/31/2016			Miscellaneous			
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Compliance Tasks - Expand All Applicable / Expand All / Collapse All			Batch A Than Year End	Print Package 💌 💌			
Scrub/Eligibility		Global Participant Search	Reports:				
Allocation     Combined Test			Conversion Uploads	Reports:			
			History Uploads	Reports:			

You will be directed to the Workflow page and can sort by the "Yr End" column to see all the plans for that year end.

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