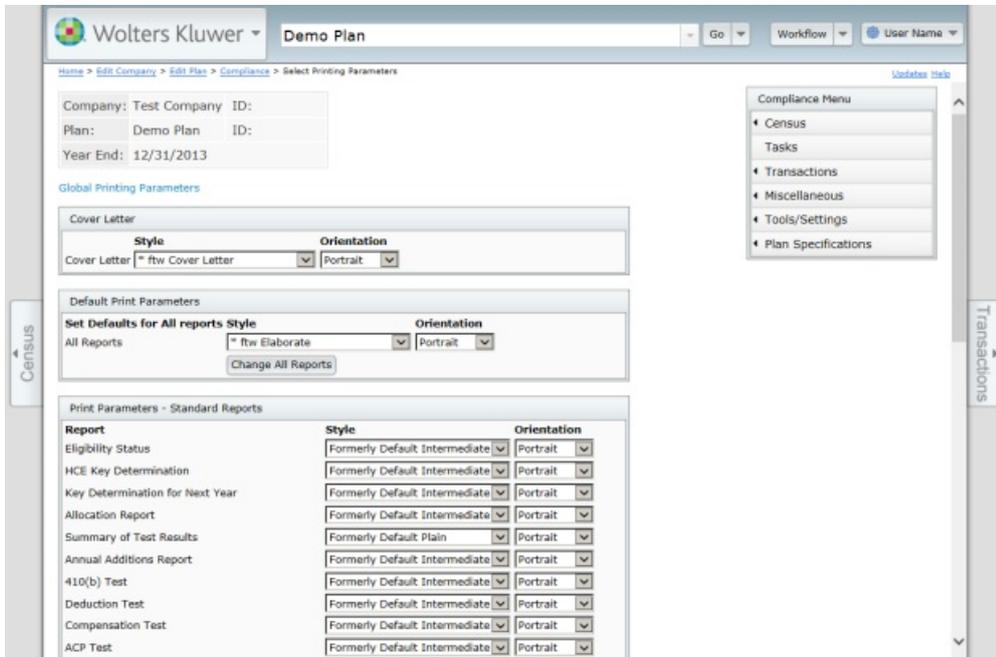


9.3.2. Plan Level

10/29/2024 4:33 pm CDT

In the "Select Printing Parameters" screen are options to add a default cover letter, select a printing style and orientation for this cover letter and each of the reports.



Having designed custom styles for the client letter and reports, the next step is to select a style or styles to use and their orientation. The custom styles previously created will display as options in the drop-down box within the "Select Printing Parameters" screen. On this screen you can select a print style for your client letter, and for each of your reports and statements. You can either select one style for all reports and statements or you can select the styles individually for each report and each statement type. See the screen shot below - the box in the middle allows you to select a single style for all reports and statements whereas the box below is where you make the individual selections for reports. A further option is the orientation for the report - whether you prefer Portrait or Landscape

Wolters Kluwer Demo Plan

Home > Edit Company > Edit Plan > Compliance > Select Printing Parameters

Company: Test Company ID:
 Plan: Demo Plan ID:
 Year End: 12/31/2013

Global Printing Parameters

Cover Letter

Style	Orientation
Cover Letter	Portrait

Default Print Parameters

Set Defaults for All reports

Style	Orientation
All Reports	Portrait

Print Parameters - Standard Reports

Report	Style	Orientation
Eligibility Status	Formerly Default Intermediate	Portrait
HCE Key Determination	Formerly Default Intermediate	Portrait
Key Determination for Next Year	Formerly Default Intermediate	Portrait
Allocation Report	Formerly Default Intermediate	Portrait
Summary of Test Results	Formerly Default Plain	Portrait
Annual Additions Report	Formerly Default Intermediate	Portrait
410(b) Test	Formerly Default Intermediate	Portrait
Deduction Test	Formerly Default Intermediate	Portrait
Compensation Test	Formerly Default Intermediate	Portrait
ACP Test	Formerly Default Intermediate	Portrait

Compliance Menu

- Census
- Tasks
- Transactions
- Miscellaneous
- Tools/Settings
- Plan Specifications

Census Transactions

See the screen shot below - this is the statement section of the "Edit Print Styles" screen and is available for both statement formats.

If you opt to make individual style selections for statements, you do this directly below where you select report styles.

Home > Edit Company > Edit Plan > Compliance > Select Printing Parameters

Print Parameters - Standard Reports

Report	Style	Orientation
Eligibility Status	Formerly Default Intermediate	Portrait
HCE Key Determination	Formerly Default Intermediate	Portrait
Key Determination for Next Year	Formerly Default Intermediate	Portrait
Allocation Report	Formerly Default Intermediate	Portrait
Summary of Test Results	Formerly Default Plain	Portrait
Annual Additions Report	Formerly Default Intermediate	Portrait
410(b) Test	Formerly Default Intermediate	Portrait
Deduction Test	Formerly Default Intermediate	Portrait
Compensation Test	Formerly Default Intermediate	Portrait
ADP Test	Formerly Default Intermediate	Portrait
Testing/Demographic Analysis Report	Formerly Default Plain	Portrait
ADP Corrections	Formerly Default Intermediate	Portrait
Enhanced ADP ADP Corrections	Formerly Default Plain	Portrait
Estimate QNEC	Formerly Default Intermediate	Portrait
Disproportionate QNEC	Formerly Default Intermediate	Portrait
True-Up Report	Formerly Default Intermediate	Portrait
Integrated Report	Formerly Default Intermediate	Portrait
General Test	Formerly Default Intermediate	Portrait
Gen Test Average Benefits	Formerly Default Intermediate	Portrait
Top Heavy Report	Formerly Default Intermediate	Portrait
Plan Highlights	Formerly Default Plain	Portrait
Participant Lookup Grid	Formerly Default Intermediate	Portrait
Service Grid	Formerly Default Intermediate	Portrait
Initial Eligibility Grid	Formerly Default Intermediate	Portrait
Continuing Eligibility Grid	Formerly Default Intermediate	Portrait
HCE Grid	Formerly Default Intermediate	Portrait
Key Grid	Formerly Default Intermediate	Portrait
Allocation Grid	Formerly Default Intermediate	Portrait
410(b) Grid	Formerly Default Intermediate	Portrait
ADP/ACP Grid	Formerly Default Intermediate	Portrait
General Test Grid	Formerly Default Intermediate	Portrait
UDF1: * f/w First Year Supplemental Census Grid	Formerly Default Intermediate	Portrait
UDF2: * f/w Self Employment Calculations	Formerly Default Intermediate	Portrait

Print Parameters - Statements

Report	Style	Orientation
Statements - Individual Participant	Formerly Default Intermediate	Portrait
Statements - Custom Individual Participant	Formerly Default Intermediate	Portrait
Detail - Participant Account Report	Formerly Default Intermediate	Portrait
Detail - Participant Account Report w/Dates	Formerly Default Intermediate	Portrait
Summary - Participant Accounts	Formerly Default Intermediate	Portrait
Totals - Participant Accounts	Formerly Default Intermediate	Portrait
Participant Distributions	Formerly Default Plain	Portrait

Census

Transactions