

10.6. Aggregation of non-ftw plan with ftw plans

10/29/2024 4:36 pm CDT

Overview

Users may combine non-ftwilliam.com (non-ftw) summary testing data with plans in ftwilliam.com (FTW) by entering the applicable non-ftw data in either the Combined Test Parameters page and/or ADP/ACP Test Parameters screen, so that those entered amounts can be aggregated with the amounts in the current plan for 410b, deduction and ADP/ACP testing. The following steps assume the plan specifications, source data and census data are already set up in the FTW plan.

Setup

To identify a plan in FTW as an aggregated plan, go to "Set Combined Test Parameters". The aggregation options are in the "Aggregation/Disaggregation" box and can be changed using the options for "Testing Aggregation Used". The options for "Testing Aggregation used:" are:

- "Yes" (aggregate data at the participant level – plans on Ft. William),
- "No" (no aggregation) and
- "Yes - Non ftw plan" to indicate that aggregation will be performed using summary testing data from other Plans.

To aggregate a plan with a non-ftw plan, set "Testing Aggregation used:" to "Yes – Non ftw plan", then press "Refresh".

The screenshot shows a web interface for configuring test parameters. The main section is titled "Aggregation/Disaggregation". It contains several sub-sections: "Divisions - Not used" with a radio button for "Yes / No"; "MEP - APA - Not used" with a dropdown menu set to "None"; and "410(b)/401(a)(4)/ADP/ACP Testing" with a dropdown menu set to "Yes - Non ftw plan". There are also links for "Review/Edit Non-ftw Data" and "Help".

Enter Combined Test Data

Once the aggregation is set to "Yes – Non ftw plan" and the user has pressed the "Refresh" link, the "Review/Edit Non-ftw Data" link will appear.

This screenshot shows the same configuration page as above, but with more details visible. The "Testing Aggregation used:" dropdown is still set to "Yes - Non ftw plan". Below it, there are several input fields and dropdown menus, some with a "22" next to them. A blue link "Review/Edit Non-ftw Data" is now visible, with a black arrow pointing to it from the right.

Clicking the “Review/Edit Non-ftw Data” link will take the user to the Combined Test Non-ftw Data screen. In this screen, users can enter data for the 410(b) Ratio Percentage Test (Coverage Test) and the Deduction Limit Test. The data entered here will be aggregated with the FTW plan data to produce aggregated test results.

Enter ADP/ACP Test Data

To enter ADP/ACP test results for a non-ftw plan, click “Set ADP/ACP Testing Parameters”. In the second box of options, users will see “Plan Aggregation” set to “Yes – Non ftw plan” and a link to “Review/Edit Non-ftw Data”.

Clicking this link will take users to the ADP/ACP Non-ftw Data screen, where participant counts and total ADRs from Non-ftw plans can be entered.

- In the NHCE Cnt columns, the total number of NHCEs in the ADP/ACP test should be entered here.
- In the Total NHCE ADR/ACR columns, the total ADR for all NHCEs in the ADP test should be entered here.
- Similarly, in the HCE Cnt columns, the total number of HCEs in the ADP/ACP test should be entered here.
- In the Total HCE ADR/ACR columns, the total ADR for all HCEs in the ADP test should be entered here.

If the Non-ftw plan has collective bargaining agreement (Union) employees, click the “Add rows for CBA employees” button and complete the extra grid rows. Please note that clicking this button will appear to delete the data that was previously entered in this screen. The data has not been deleted. After completing all applicable boxes, press the “Update” button at the bottom of the screen.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [Admin](#) > [ADP/ACP Parameters](#) > [ADP ACP Non-ftw Data](#)

ADP ACP Non-ftw Data

Group		NHCE				HCE			
		ADP		ACP		ADP		ACP	
Union/Non-Union	Disaggregation	NHCE Cnt	Tot NHCE ADR	NHCE Cnt	Tot NHCE ACR	HCE Cnt	Tot HCE ADR	HCE Cnt	Tot HCE ACR
N/A	All								
N/A	DisaggOver/ExclNHC								
N/A	DisaggUnder								

NOTE: Data will NOT be deleted.

Now that all of the non-ftw plan data has been entered, users may run the data scrub, allocations, and tests as they normally would.