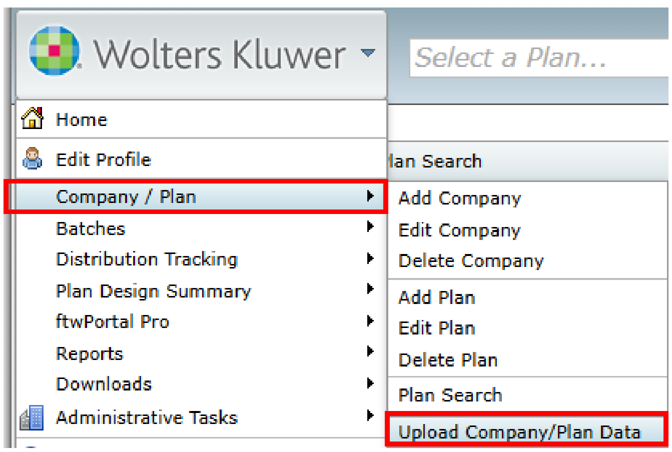
Upload Company/Plan Data

04/15/2026 9:57 am CDT

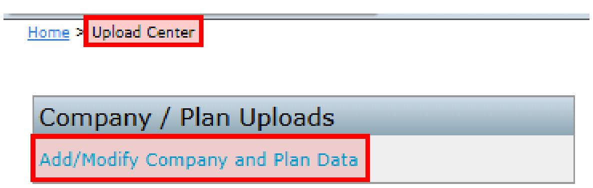
The Upload Company/Plan data feature enables users to efficiently manage company and plan information by allowing you to add companies and plans, as well as update existing data, using a CSV file. This streamlined process helps users quickly import and modify large sets of company and plan records, ensuring accurate and up-to-date information within the system.

Upload Center

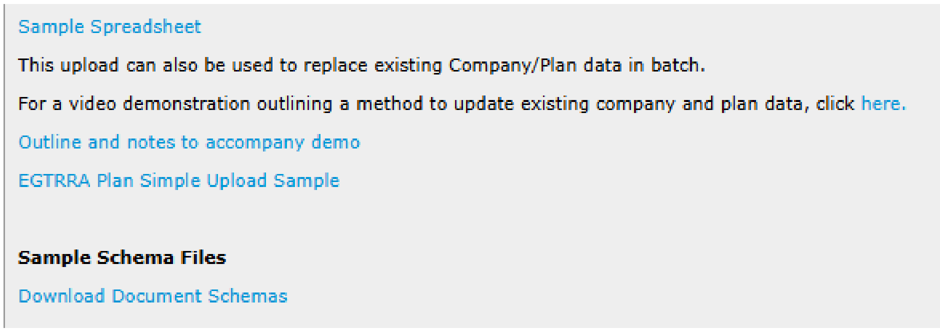
You can access the Upload Center from the Wolters Kluwer drop-down menu, select Company/Plan, followed by Upload Company/Plan Data.



Add/Modify Company and Plan Data - this link can be used to create your own upload to update existing plans or add new plans.



The following page, Upload Company and Plan Information, offers several files that allow you to add or update companies or plans. Additionally, it outlines specific requirements that must be fulfilled to ensure a successful upload.



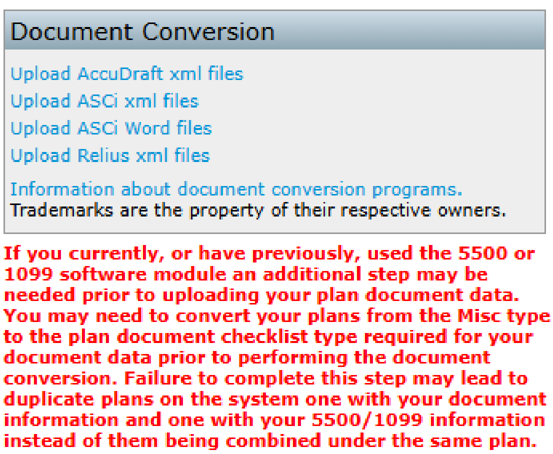
Sample Spreadsheet - provides an example of uploading two new companies and three plans. Where there are no values listed in a column, the software will use what is in the ZZZ-Default for the applicable plan checklist type.

Outline and notes to accompany demo - downloads an instruction document to follow with the demo video.

EGTRRA Plan Simple Upload Sample - provides a CSV file of only EGTRRA checklist types for you to upload to your account.

Download Document Schemas - provides a link to download all available plan and company schemas to choose from.

Document Conversion - To upload a file in answers-only format from another software vendor, click the relevant link.



Adding New Companies and Plans

To add new companies or plans to your account, the file upload must include identifying information for each entity as column headers.

Required Fields

- CompanyName: This column header is mandatory for every new company or plan.

Adding a Plan

- ftwCustomerID, CustomerID, or CompanyEmployerID (EIN): One of these must be included as a column header

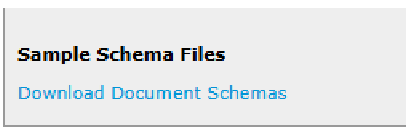
to link the plan to its sponsor.
- PlanLine1: A column header indicating the plan name.
- Checklist and PlanType: Column headers for these values must be included, and the combination must match the options listed on the downloaded document schema.

Updating Existing Companies and Plans

Updating Company Information

To update information for an existing company on your account, the file upload include at least one of the following identifiers for each entity as a column header:

- CustomerID: This is a unique value you assign to each employer.
- CompanyEmployerID: Employer’s EIN.
- ftwCustomerID: This unique ID is generated by the ftw system. You can find these IDs by clicking Download ftwilliam.com plan IDs from the Download Document Schemas link.



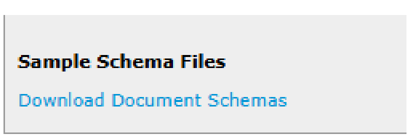
Updating Plan Information

To begin updating plan information for existing plans on your account, the first step is to download the report named Document Provisions by Checklist. This report provides a comprehensive CSV file containing the current plan provisions, which you can edit as needed before uploading the updated information back into the software.

For detailed instructions on how to generate and use this report, please refer to the Reports section in the Document User Guide.

To update an existing plan, you must provide at least one of the following identifiers as a column header for each plan to ensure the system recognizes the plan you wish to modify:

- PlanID: A unique value you assign to each plan.
- PlanNumber: The plan’s number and one of the company identifiers above for the associated company.
- FTWPlanID: This unique ID is generated by the ftw system. You can find these IDs by clicking Download ftwilliam.com plan IDs from the Download Document Schemas link.



Important Notes About Uploading Data

It is recommended to retain the Plan Name (PlanLine1 column header) for easy reference even though this information is not required for the upload.

If you upload a .csv file containing blank entries for certain fields, those values will be deleted for the corresponding row—unless the row includes identifying information for the plan as described above, or the field only accepts List

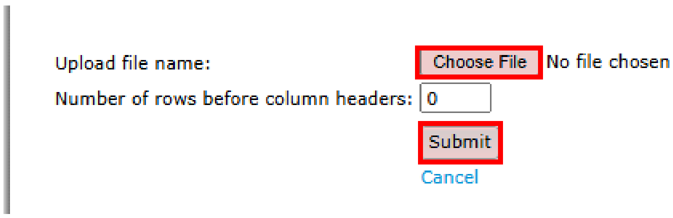
Values.

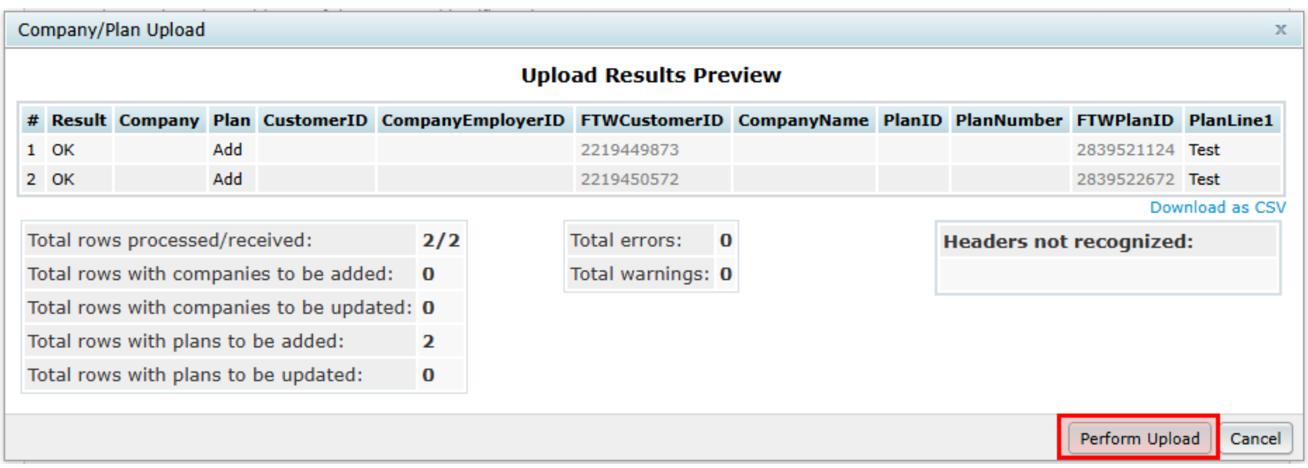
To ensure accuracy, review the Download Document Schemas for details on which fields use list values and what those list values are.

Uploading a File and Understanding Upload Results

Uploading a File

To upload a file, choose the file from your computer and and click the "Submit" button. The system will provide an immediate preview window of the proposed changes before the upload is performed. This preview enables you to review total updates, additions, any errors and warnings, ensuring accuracy and preventing unwanted changes.





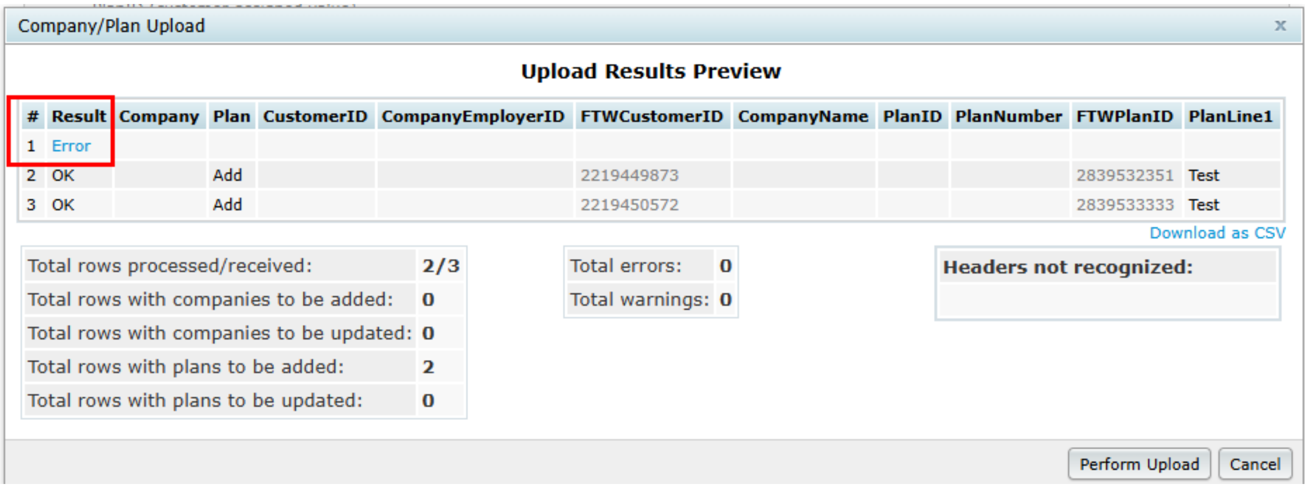
Reviewing the Upload Results Preview

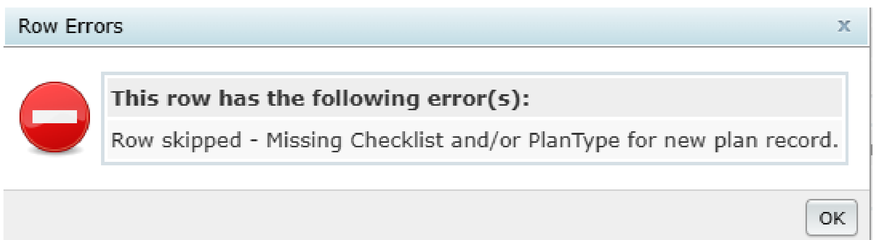
The preview window will provide the changes that will be made to each plan and company listed in your upload file. The preview table always includes the following column headings:

- PlanID
- CustomerID
- ftwCustomerID
- CompanyEmployerID (EIN)

If any of these values are updated in your file, the new value will appear in the corresponding column. If the column is blank, it means no change is being made to that field.

Under the "Results" column, you preview any errors or warnings ahead of performing the upload. To view, just click on the link.





Performing the Upload

If all of the information in the Upload Results Preview is accurate, click on the "Perform Upload" button to complete the upload.

Errors and Warnings

After an upload, you may encounter errors or warnings. These notifications help ensure data integrity:

- Warnings: If a warning occurs, the specified value will be excluded from the upload for the stated reason, but any other valid data will continue to be processed. For example, you may receive a warning if an entry does not match the required schema responses. In a company upload, setting 'EntityType' to 'Union' would trigger a warning since 'Union' is not an allowed value.
- Errors: If there is insufficient identifying information to update or add a record, an error will occur and the entire row or entry in your .csv file will be skipped.

Restricted Operations via File Upload

To prevent entry errors, certain changes cannot be made through file uploads. These forbidden operations include:

- Changing the Plan Sponsor of an existing plan
- Changing the Plan Type or Checklist Type