FTW Step 1: ftw Plan Document

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- If you are **not** subscribed to the ftw Plan Document module:
    - If you have an existing plan designated as a "Misc" plan type, you have what you need.
    - If the plan does not already exist, add a Misc plan type.
    - In either case, you will be filling out Plan Specifications directly in the DB Compliance module and not in the plan document software. This will be done after you create the first plan year in a later step.
- For subscribers of the ftw Plan Document module:
    - If you have an existing ftw Cash Balance or Defined Benefit plan document, you have everything you need. DB Compliance will use the document to fill in the Plan Specifications when the first plan year is created in a later step. Be aware that only Cash Balance or Defined Benefit plan types will work with DB Compliance. They can be either PPA or Cycle 3 document versions.
    - If the plan does not yet exist, add a Cash Balance or Defined Benefit plan, then fill in the document specifications. DB Compliance will use the document to fill in the Plan Specifications when the first plan year is created in a later step.
    - IMPORTANT: If there is an existing plan designated as a "Misc" plan type which has been used for 5500 or other processing, "Convert" the plan to a Cash Balance or Defined Benefit plan type by clicking the “Edit Plan” button to the right of the plan’s name on the Home page, then click “Convert Plan” found in the top right-hand corner of the screen. Choose the correct DB plan type before clicking the “Convert Plan” button at the bottom. Lastly, fill in the document specifications. DB Compliance will use the document to fill in the Plan Specifications when the first plan year is created in a later step.