


FTW Step 4: Verify the Primary Grid in the Conversion Year

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- In the Census tab, the Primary Grid should automatically set to *ftw DB Conversion Standard when it is the first plan year on the system. This is used by the Scrub task to map data appropriately. If you have a custom grid to use or the primary grid is not already set as indicated:
 1. Click the vertical ellipsis  on the right-hand side of the screen and select 'Grid Manager'.
 2. Under the drop-down list for 'Primary Grid', select the conversion grid to be used.
 3. Save your changes by clicking the 'Update' button., then click 'Close'.
 4. **Do not change this Primary Grid for any other purposes.**

REFERENCE - Other standard grids for use at conversion and otherwise

Besides the Conversion grid, the module has pre-built standard grids for uploading and/or simply viewing the data. You can also create your own custom grids that will be available to you in all of your plans regardless of the plan it was created in. These are pre-defined:

- * **ftw DB Conversion Standard (ID: d9d9b16)**- Upload conversion data as of the conversion date
- * **ftw DB Census Collection (ID: ce207db)**- Annual census upload
- * **ftw Contribution Upload (ID: d043c55)** - Create from a DC Compliance plan or produce a template to upload DC allocations to become part of the DB plan's data for use in combo plan testing
- * **ftw DB Census Combo Plan Allocations and Proposal Grid (ID: f034afa)** - DB Proposal upload format can be used as a template or created from the DC Proposal system
- * **ftw DB Census Supplemental Deferred and In-Pay Benefits (ID: 720ca0e)**- Upload payment information for deferred vested and in-pay participants
- * **ftw DB Combo Plan Eligibility Overrides (ID: ac840f7)**- Manage eligibility for DC plan sources when eligibility differs from the DB plan (facilitates proper combo plan testing)
- * **ftw 417(e) Calculation (ID: c2deb34)** - Contains instructions and data for plan terminations
- * **ftw DB Participant Report - Census Information (ID: 00145d3)** - General active census data summary
- * **ftw DB Participant Report - Cash Balance Plan (ID: d411773)** - Participant statement listing
- * **ftw DB Participant Report - Defined Benefit Plan (ID: 20e1626)** - Participant statement listing
- * **ftw DB Fractional Accrual Formula - projected service (ID: a9f7cc4)** - Projected service summary for plans with fractional accrual formulas
- * **ftw DB Liabilities (ID: 0623b40)** - Summary of key accrued benefits, vesting and liabilities
- * **ftw DB BOY Valuation - key data (ID: 5b6a629)** - Summary of key data used in BOY valuations
- * **ftw DB Post-NRA Actuarial Increases (ID: f488fe0)** - Actuarial increase factors and protected benefits

