


FTW Step 7: Run Scrub for Conversion Year

10/30/2024 1:03 pm CDT

- Click on the 'DB Compliance Tasks' tab
- Data overrides – The conversion process assumes certain pre-calculated data exists. The overrides shown below are automatically set to Yes to bypass calculations and rely on the data provided. You can see these settings by clicking the blue header bar. Most of these are intended as one-time overrides for the conversion year only but can be used at any time. **It is not recommended setting any of these preset 'Yes' values to 'No' in the conversion year.**

Scrub/Eligibility (current year-end data)	
Service & Eligibility Overrides	
Override calculation of prior year eligibility service:	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override calculation of prior year participation service:	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override pensionable benefit service at year-end	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override calculation of prior year vesting service:	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override 415 Service at year-end	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override 415 Participation at year-end	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override vested percent EOY	<input type="radio"/> Yes / <input checked="" type="radio"/> No
Override vested percent BOY	<input type="radio"/> Yes / <input checked="" type="radio"/> No
Override initial eligibility status/entry date:	<input checked="" type="radio"/> Yes / <input type="radio"/> No
Override continuing eligibility:	<input type="radio"/> Yes / <input checked="" type="radio"/> No
Override assumed retirement date	<input type="radio"/> Yes / <input checked="" type="radio"/> No
Override projected pensionable benefit service to NRD	<input type="radio"/> Yes / <input checked="" type="radio"/> No
Override projected 415 participation to NRD	<input type="radio"/> Yes / <input checked="" type="radio"/> No
Override projected 415 service to NRD	<input type="radio"/> Yes / <input checked="" type="radio"/> No
HCE KEY Overrides (please ensure all plans being tested select the same options)	
Override automatic determination of HCEs and Keys:	<input checked="" type="radio"/> Yes / <input type="radio"/> No

- Run the Scrub - Click the Run icon  for the Scrub task.
- Eligibility Status report – Check this report for accuracy before proceeding by clicking any of the icons for Word, pdf, or excel format. Other reports are also available.