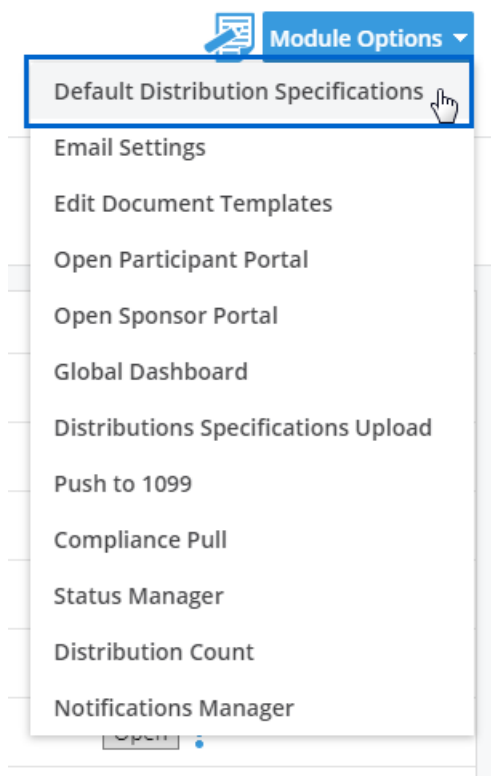# Default Distribution Specifications

12/04/2024 4:09 pm CST

DTS Specifications Video

Before getting started in DTS, it is highly recommended that you set your DTS specifications for all plans first. The specifications drive what appears in the data collection screens via the portal, as well as which parties should have access for data entry and initiation via the portal.

If the majority of your distribution specifications will be the same, the quickest way to set-up your specifications is via the "Default Distribution Specifications" option in the "Module Options" menu.

Everything you enter in the Default Distributions Specifications will apply to every plan in your account where you have NOT accessed DTS. If you have accessed DTS via some plans, you will need to go back and set those plans up separately. Any plans not previously accessed will automatically be updated with your default answers.

Use the help buttons to see a description of what each of the specifications questions are used for in DTS.

Default Distribution Specifications　　　　　　　　　　　　　　　　　　　　**✕**

▾ Distributions Specifications

▾ General Information

1. Who can initiate a Distribution?	❓	TPA and Participants ▾
2. 3(16) Fiduciary Service	❓	○ Yes / ◉ No
3. Who should have portal access for data entry	❓	TPA ▾
3a. Who can reset the participant password?	❓	TPA and Plan Sponsor ▾
4. Enable Loan Tracking	❓	◉ Yes / ○ No
4a. Who can initiate a Loan?	❓	TPA ▾
4b. Who should have portal access for loan data entry	❓	TPA ▾
5. Account Manager Name	❓	
6. Account Manager Email	❓	
7. Account Manager Phone	❓	
8. Account Manager Fax	❓	
9. Account Manager Office Hours	❓	
10. Require directions for Custodian or Recordkeeper?	❓	Custodian ▾
10a. Provider Account ID	❓	
10b. Provider Name (ie. custodian or recordkeeper)	❓	