

Creating a Distribution Record

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Creating Distribution and Loan Records Video

There are two ways to create a distribution from the TPA side. You can either click the “Start Distribution” button on the plan level dashboard or you can click the menu icon on the participant dashboard and select “Start Distribution”.

The image displays two screenshots of the Wolters Kluwer DTS Sample 401(k) Plan Distribution Manager interface. The top screenshot shows the plan level dashboard with a "Start Distribution" button highlighted in a red box. The bottom screenshot shows the participant level dashboard with a dropdown menu for a participant, where "Start Distribution" is also highlighted in a red box.

Plan Level Dashboard:

- Company: DTS Sample 401(k) Plan (ID: DTS-HRG)
- Company ID: | Plan ID: DTS-HRG | PYE: | EIN: 12-1234567 | Plan Number: 001
- Buttons: Distributions, Participants, Specifications
- Search: Find by Name or Distribution Type
- Button: Start Distribution

Participant Level Dashboard:

- Company: DTS Sample 401(k) Plan
- Company ID: | Plan ID: DTS-HRG | PYE: | EIN: 12-1234567 | Plan Number: 001
- Buttons: Distributions, Participants, Specifications
- Search: Find by Name, Email, Phone or Last Activity
- Button: Add Participant

Email	Name	Phone	Last Activity	Pending
<input checked="" type="checkbox"/> isla@gmail.com	Fisher, Isla	414-555-5555		1
<input type="checkbox"/> rory@rory.com	Franklin, rory			
<input type="checkbox"/> rory@rory.com	godfrey, rory			
<input type="checkbox"/> email@domain.com	Test, Test	414-555-5555		
<input type="checkbox"/> email@domain.com	Roussel-Godfrey, Holly	414-555-5555		