Attach files to distribution

12/05/2024 7:57 am CST



The "Do With Selected" tool can be used to batch generates documents you created via the "Document Template Editor" along with forms provided by default from the ftwilliam.com Plan Document software. These forms are provided even if you do not subscribe to our Document Software Module.

The first step in the process is to select which participants you would like to create documents for. This can be done by selecting the checkbox on the left side of the grid next to your participant's name. If you would like to create documents for all participants at once, you may use the top checkbox located next to "First Name" on the grid. Once your participants are selected, click the "Do with Selected" option in the bottom left corner of the grid for options.

Distribution	ns Pa	rticipants	Specifications		19 Statuses Selec	ted 🔻 From 🛅 To		Find by N	ame or Distributi	on Type	Q	+ Start Distribution -
First Name	Last Name	SSN	Plan Name	Involuntary	Distribution Type	Status	Alert	Last Update	Started	Owner		
☑ Data	Collection	7894	DTS Sample 401(k) Plan		Unspecified	💮 Needs TPA Input	•	08/23/2018	08/23/2018	Holly (HollyRG)	Open	
🕑 Skip	Sponsor	5678	DTS Sample 401(k) Plan	Ø	Roll Over to Qualified Plan	 Needs Sponsor Input 		08/23/2018	08/16/2018	Holly (HollyRG)	Open	
🕑 Skip	Sponsor	1234	DTS Sample 401(k) Plan		Cash Out	 Needs TPA Input 	•	08/23/2018	08/07/2018	Holly (HollyRG)	Open	
✓ Harold	Jones	9632	DTS Sample 401(k) Plan		Unspecified	💮 Needs Participant Input		08/21/2018	08/21/2018	Holly (HollyRG)	Open	
🗹 Loki	Laufeyson	3216	DTS Sample 401(k) Plan		Unspecified	 Needs Participant Input 		08/21/2018	08/07/2018	Holly (HollyRG)	Open	
🕑 Isla	Fisher	1234	DTS Sample 401(k) Plan		Roll Over to Traditional IRA	 Needs Participant Input 		08/20/2018	08/07/2018	Holly (HollyRG)	Open	
🕑 Skip	Participant	7894	DTS Sample 401(k) Plan	0	Cash Out	O Not Started		08/01/2018	08/01/2018	Holly (HollyRG)	Open	
Print attached files												
Attach riles to distribution Send invitation to participants												
Do With Selected							Export CSV					

The next step in the process is to choose which files you would like to batch create. You do this by first clicking "Attach files to distribution". This will automatically attach all of the selected files to the distribution record. Rather than saving the files to your computer, everything is conveniently stored in the distribution record for your reference and can be re-printed at a later date.

Once the "Choose files to attach to record" box appears, simply check the box next to the forms and document

templates you would like to include. Remember, if you inserted placeholders in your templates during set-up, those placeholders will automatically pull in the appropriate participant data into your documents for saving and printing. After you've made your selection, click "Attach" and the software will produce a confirmation letting you know when the process is completed.

Choose files to attach to record X							
Document Module Special Tax Notice Distribution Form QJSA Distribution Form Non-QJSA Benefit Statement QDRO Procedures Inservice Distribution Form <i>i</i> Beneficiary Dist Election Form Beneficiary Designation	Document Templates QJSA Notice Default - QJSA/Spousal Consent with Notary Default Cover Letter For Sponsor Sign and send on to participant Default Force-out Under \$1,000 with RK Fee Default Distribution Notice Account Balance Exceeds Force-out Amount Default Sample Trustee Authorization Default Force-out with auto-rollover and RK Fee Default Sample Provider Directive For Rollover Testing all placeholders						
	Cancel Attach						
Carriero De como este							
saving Documents							
1496							
	ок						