

Download Audit Package

12/05/2024 7:58 am CST

Audit Trail Video

In addition to download the distribution 'Activity Summary' for a specific distribution, you may also do this for all of your distributions at one time via the 'Do With Selected' tool. This option will appear whether you are on the plan level or the global dashboard. You will first need to select the distributions you wish to export. From there, click the 'Do With Selected' button and choose 'Download audit package' option from the menu. The software will generate a zip file that includes a separate zip for each of your distribution records. Within that file, you will find your 'Activity Summary' and the 1099 and 945 if you prepared them using our Form 1099 Software.

DISTRIBUTIONS

Distributions Participants Specifications 20 Statuses

<input checked="" type="checkbox"/>	First Name	Last Name	SSN	Reason	Involuntary	Distribution Type
<input checked="" type="checkbox"/>	Ron	Weasley	7893			
<input checked="" type="checkbox"/>	Harry	Potter	7891	Termination of Em...	<input checked="" type="checkbox"/>	Cash Out
<input checked="" type="checkbox"/>	Hermione	Grainger	7892	QDRO		
<input checked="" type="checkbox"/>	Harry	Potter	7891		<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Harry	Potter	7891	Termination of Em...	<input checked="" type="checkbox"/>	Cash Out
<input checked="" type="checkbox"/>	Hermione	Grainger	7892	QDRO		Unspecified
<input checked="" type="checkbox"/>	Neville	Longbottom	7895	Retirement		Cash Out

- Download attached files
- Attach files to distribution
- Send participant portal invitation
- Send participant email template
- Download audit package**
- Provider Options ▶
- Delete Distributions

Do With Selected ▼

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
 Grainger, Hermione -	Compressed (zipped) Fol...	44 KB	No	44 KB	0%	4/30/2019 11:25 AM
 Grainger, Hermione - Unspecified	Compressed (zipped) Fol...	172 KB	No	172 KB	0%	4/30/2019 11:25 AM
 Longbottom, Neville - Cash Out	Compressed (zipped) Fol...	356 KB	No	356 KB	0%	4/30/2019 11:25 AM
 Potter, Harry -	Compressed (zipped) Fol...	4,280 KB	No	4,280 KB	0%	4/30/2019 11:25 AM
 Potter, Harry - Cash Out	Compressed (zipped) Fol...	587 KB	No	587 KB	0%	4/30/2019 11:25 AM
 Potter, Harry - Cash Out_1	Compressed (zipped) Fol...	674 KB	No	674 KB	0%	4/30/2019 11:25 AM
 Weasley, Ron -	Compressed (zipped) Fol...	41 KB	No	41 KB	0%	4/30/2019 11:25 AM