

Delete Distributions

12/05/2024 8:19 am CST

If you need to delete distribution records in batch, simply select the records that you want to delete on the dashboard and then use the “Delete Distributions” button in the “Do With Selected” tool to remove them. Please note, if your record was marked “Complete” or has a 1099 completed, you will not be able to delete the record.

<input checked="" type="checkbox"/>	First Name	Last Name	SSN	Reason	Involuntar
<input checked="" type="checkbox"/>	Harry	Potter	7891	Loan	
<input checked="" type="checkbox"/>	Harry	Potter	7891		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Test	Test	3257	Termination of Em...	
<input checked="" type="checkbox"/>	Harry	Potter	7891	Loan	
<input checked="" type="checkbox"/>	Harry	Potter	7891	Termination of Em...	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Luna	Lovegood	6363		
				Hardship	
				Loan	
				Retirement	

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

Do With Selected ▼