Participant Data/Calculate/Reports

12/11/2024 8:37 am CST

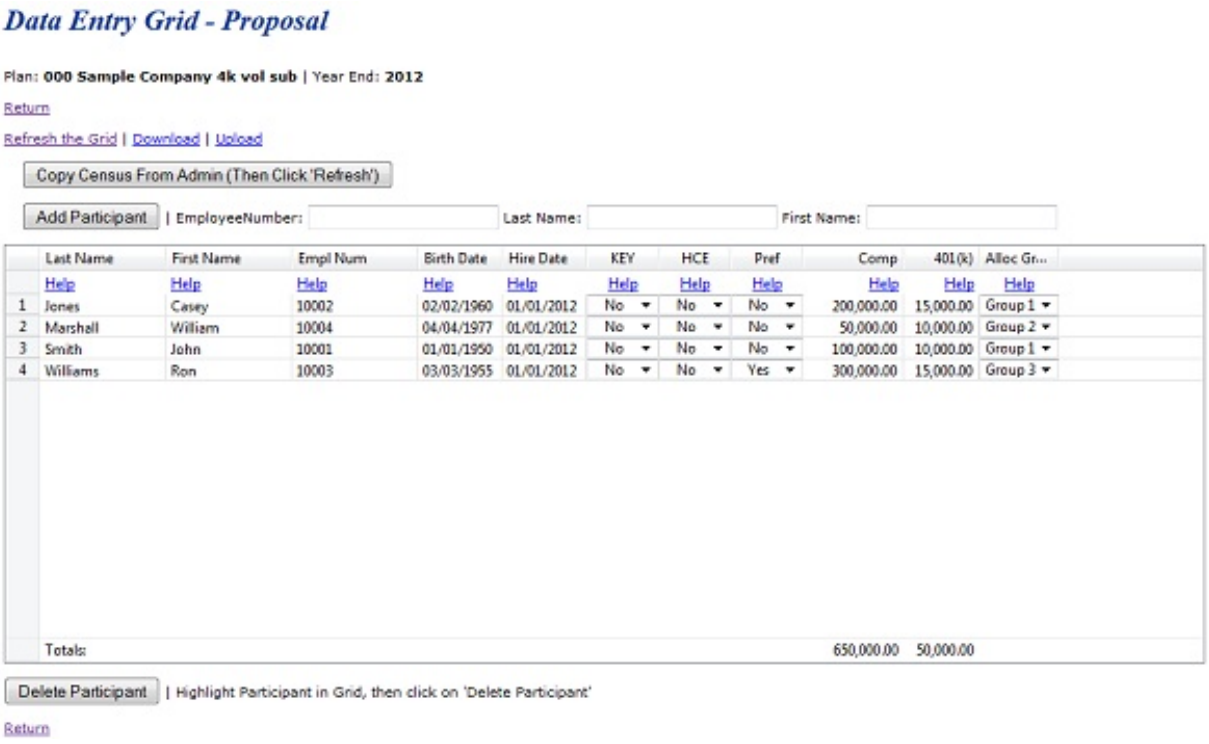
Work with Census This link allows the user to enter participant data. The data may be manually entered, uploaded or imported from the current census in the Administration System.

- To enter participants via a spreadsheet, click to "Download" the grid (from the screen shown at right). Open the file and enter your data. Then click to 'Upload" and browse for the file.
- If you are using the admin system for this plan, you can simply click to "Copy Census From Admin (Then Click 'Refresh')". As the button indicates, you must click to "Refresh the Grid" once you have copied the census (link located above the copy button). You will then see names and information copied over from the most recent year in the Admin system. This data can be further modified for purposes of the proposal system.
- To manually enter a participant, type in the employee number, first name and last name and click "Add Participant".

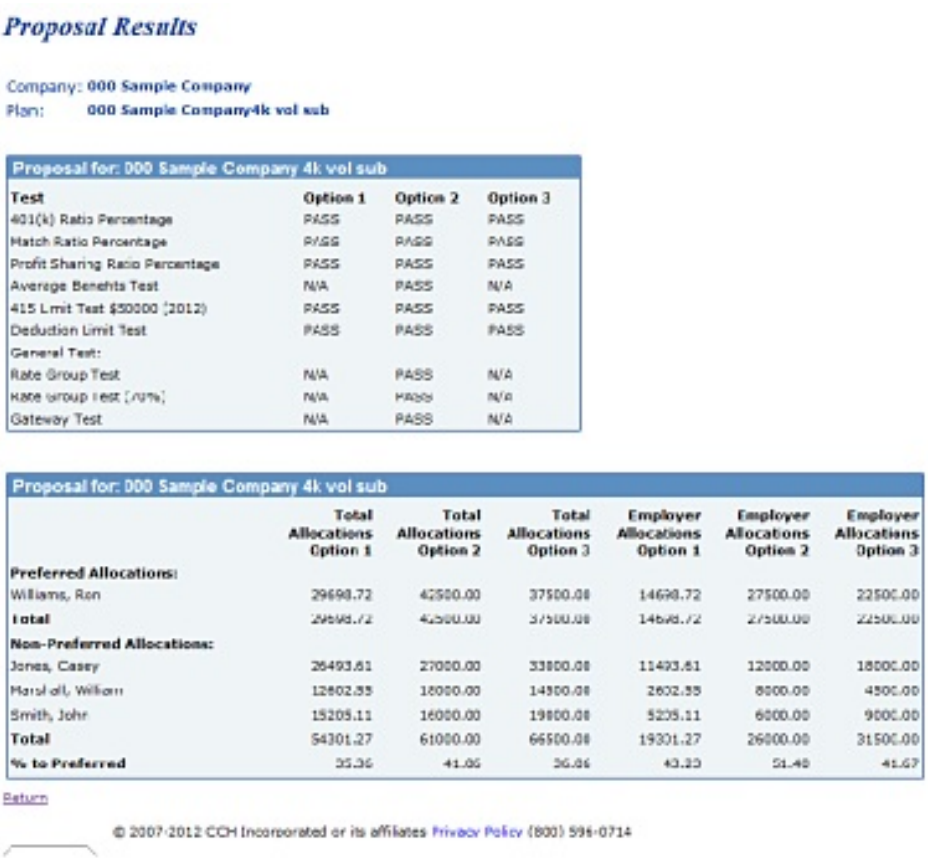
The "Pref" (Preferred) column (between 'HCE' and 'Comp') indicates if the participant will be separately report in the preferred section of the report. At least one preferred participant should be selected.

Hint! To have the system calculate HCE and Key status, we suggest uploading the census data into the Administration System and running the data scrub. Then return to the proposal screen and 'Copy Census from Admin'.

Note: All participants in the census on the proposal system are assumed to be eligible for all sources.



Calculate This link will calculate allocations and run applicable tests for all options and gives a result screen with allocations and test results.The proposals must be recalculated each time participant or plan specification data changes.



Proposal Results

Company: 000 Sample Company
Plan: 000 Sample Company4k vol sub

Proposal for: 000 Sample Company 4k vol sub

Test	Option 1	Option 2	Option 3
401(k) Ratio Percentage	PASS	PASS	PASS
Match Ratio Percentage	PASS	PASS	PASS
Profit Sharing Ratio Percentage	PASS	PASS	PASS
Average Benefits Test	N/A	PASS	N/A
415 Limit Test $50000 (2012)	PASS	PASS	PASS
Deduction Limit Test	PASS	PASS	PASS
General Test:			
Rate Group Test	N/A	PASS	N/A
Rate Group Test (70%)	N/A	PASS	N/A
Gateway Test	N/A	PASS	N/A

Proposal for: 000 Sample Company 4k vol sub

	Total Allocations Option 1	Total Allocations Option 2	Total Allocations Option 3	Employer Allocations Option 1	Employer Allocations Option 2	Employer Allocations Option 3
Preferred Allocations:						
Williams, Ron	29698.72	42500.00	37500.00	14698.72	27500.00	22500.00
Total	29698.72	42500.00	37500.00	14698.72	27500.00	22500.00
Non-Preferred Allocations:						
Jones, Casey	26493.61	27000.00	33800.00	11493.61	12000.00	18000.00
Marshall, William	12602.55	16000.00	14900.00	2602.55	6000.00	4500.00
Smith, John	15205.11	16000.00	19800.00	5205.11	6000.00	9000.00
Total	54301.27	61000.00	66500.00	19301.27	26000.00	31500.00
% to Preferred	35.36	41.06	36.06	43.23	51.48	41.67

Return

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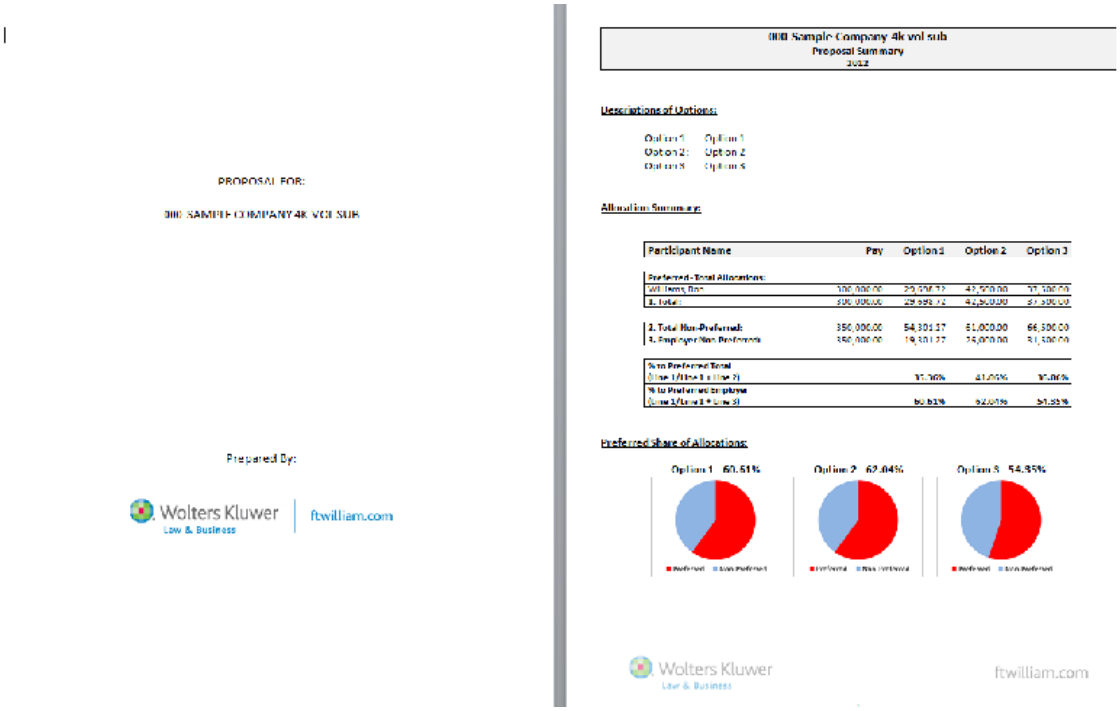
Print Report Clicking on this link will generate a report showing proposal results. First two pages shown below.



Print Settings This link will allow users to set print settings such as font type and whether a cover page is generated. It also allows a user to upload a company logo.

As shown in the sample above, you may upload two different logos for the report. The cover logo shown above is centered. The page logo shown on the second page above and is also centered.