Go to Documents/IRS Forms/5500 forms/1099s/Admin/Portal

12/11/2024 8:35 am CST

After selecting a Plan, you will be taken to the "Edit/Print Menu" page. The different sections of the checklist will appear in the 'Select Section' box. Click on each section to enter relevant plan specifications. Make sure to click 'Update' to save your changes and trigger any applicable edit checks.

- Select Section

No matter what type of subscription you have, you should see Section A 'General Information'. Click on 'General Information' to edit the plan name that appears in drop down lists in the software.

If you have a document or admin subscription, the more sections of the checklist will appear. Click on each section to enter relevant plan specifications. To edit the checklist options click on the appropriate link under "Select Section". Once you click on the link, the "Edit Plan Information" page will open where you may edit the applicable responses. Make sure to click 'Update' to save your changes and trigger any applicable edit checks.

The last item under "Select Section" is "Show History". When you click on this link, a new page will open that will display all of the actions taken with respect to the plan including the user name and date.

- Print Menu

At the bottom of the page, under the "Print Menu", are options to access specific software features for this plan: Documents/IRS Forms/5500 forms/1099s/Admin/Portal. Items where you do not have an subscription will appear as 'N/A' instead of having a "Go" button. Click on the "Go" button under Proposal to access ftwProposal Pro.

The page shown at right displays what it looks like if you have a plan documents subscription with ftwilliam.com. It may look different and have different options under the "Print Menu" depending upon the subscriptions you have with ftwilliam.com.

Details on each of the relevant software features are provided in separate user guides. The links to those user guides is provided below:

- Documents
- IRS Forms
- 5500 Forms
- 1099s
- Administration

- Portal

Edit/Print Menu

[Return to Previous Page]

Company: 000 Sample Company   Select new Company
Plan: 000 Sample Company 4k vol sub   Select new Plan
Checklist: Volume Submitter 401(k) - EGTRRA   Convert Plan to a different type   Clone Me

Select Section

	Section	Status
A	General Information	???
B	Eligibility	???
C	Contributions	???
D	Vesting	???
E	Distributions	???
F	In Service Withdrawals/Loans	???
G	Plan Operations	NOT-OK
H	Top Heavy	???
I	Custom Language	OK
J	Administrative Elections	???
	Show History	
	Print Checklist	

Print Menu

Plan Documents	IRS Forms	5500 Forms	1099-R		Admin	Portal	Proposal (Beta)
Go	Go	2011 ▾ Go	2012 ▾	Go	Go	Go	Go

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