

QS Part 6: Compliance Menu - Miscellaneous

12/04/2024 3:51 pm CST

Here you can access some additional functions in the software, as follows:

- The 5500 Data Report, which calculates participant counts for the 5500. When you are completing the 5500 there's an option available to populate the participant count fields from the compliance module report.
- 8955-SSA Export – this allows you to identify individuals who should be reported on the 8955-SSA; this can be run for a single plan or globally for all plans. Once you have reviewed the records, you can either download them to a worksheet which you can upload to the ftwilliam.com 5500 software module, or you can push the records directly from the compliance module to the 5500.
- 1099-R Export – this allows you to identify individuals for whom a 1099-R should be generated; this can be run for a single plan or globally for all plans. Once you have reviewed the records, you can either download them to a worksheet which you can upload to the ftwilliam.com 1099 software module, or you can push the records directly from the compliance module to the 5500.
- Required Minimum Distribution calculations – here you can calculate required beginning dates and required distribution amounts. This can be run for a single plan or globally for all plans.
- Miscellaneous reports - here you can access some additional reports which are not specific to any single task, such as the summary of test results, plan highlights and various vesting reports.

Detailed instructions on all these miscellaneous options are in the [User Guide](#).
