

Printing Annual Notices and Supporting Documents/Forms

11/12/2025 10:57 am CST

Prior to printing your Annual Notices and supporting documents/forms, it is recommended to first run the edit checks before printing.

To run the edit checks for all plans in your batch, go to the top of the batch screen and click on the symbol next to "Error". To print Annual Notices and desired supporting documents/forms, click on the "Print" checkbox.

Batch:	Annual Notice
Batch Name:	Sample Batch Te...
Batch ID:	345726
Month:	12
Year End:	2026

Count:	1	Error:	
Complete:	☐	Print:	☐
Publish:	☒ 09/18/2025	Status:	View

Batch Options
Document Format: Word 
Edit Filenames: [Level 1](#) | [Level 2](#) | [Level 3](#)
[Add Plans From File](#) | [Batch Edit Plan Grid](#) | [Edit Batch Name](#)

You can also select plans from your list to have the edit checks run and select which plans you want to print the Annual Notice and supporting documents/forms. Select your plans, then click on the "Do with selected".



☒	Company Name
☒	Sample Company

Print

Edit Checks

Remove

Publish

Do with selected: ▼

In addition, you have the option to customize the file names via the Edit Filenames, and select your desired format under the "Batch Options" menu.

- Level 1 applies to the folder that is downloaded from your batch. This will contain plan folders and files for all the plans in your batch.
- Level 2 applies to the file or folder within the Zip folder in Level 1.
- Level 3 applies to all the files inside of the folders in Level 2.

Batch Options
Document Format: Word 
Edit Filenames: [Level 1](#) | [Level 2](#) | [Level 3](#)
[Convert Plans](#) | [Batch Edit Plan Grid](#) | [Edit Batch Name](#)

Batch Options

Document Format: Word  

Edit Filenames: Level 1 | Level 2 | Level 3

Add Plans From File | Edit Plan Grid | Edit Batch Name

On the "Print Batch" page, you can choose which documents/forms you want to include. In addition, you can update the "Batch Printed" status, choose your download options via the "Print Options" drop down, include a cover letter, and choose to suppress the error page. Once you have made your selections, click on the "Print" button.

Print Batch: **Sample Batch Test**

Batch Printed: Update Print date

Print Options: ZIP: One Folder, All forms

Cover Letter: N/A [Edit](#)

Suppress Error Page: No

Documents / Forms [Select All / Deselect All](#)

Highlights ☐ Plan Highlights ☐ Plan Highlights - Spanish Model/Sample Amendments/Agreements ☐ Discretionary Match Sample Kit	Annual Notice ☐ Annual Notice ☐ Annual Notice - Spanish ☐ Annual Notice - SIMPLE 401(k) ☐ Annual Notice - SIMPLE 401(k) - Spanish Forms ☐ Deferral Election Form ☐ Deferral Election Form - Spanish
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[Cancel](#) [Print](#)

On the "Print Batch" page, there are four options available.

1. "Batch Printed" - Updates the "Print" date on the Batch Menu. You can choose to update the print date, leave the print date unchanged, or choose to mark as not printed.

Count:	1	Error:	
Complete:	☐	Print:	☐

Print Batch: **Sample Batch Test**

Batch Printed: Update Print date 

Print Options: Update Print date

Cover Letter: Leave Unchanged [Edit](#)

Suppress Error Page: Mark as Not Printed

Documents / Forms [Select All / Deselect All](#)

2. "Print Options" - Provides options to choose from on how Annual Notices and supporting materials are printed.

- "ZIP: One Folder, All forms" - generates a zip file in a single folder for all plans in the batch. The folder will include the Annual Notice and selected supporting materials.
- "ZIP: One folder per Plan, One file per form" - generates a zip file with individual folders for each plan in your batch. Individual plan folders will contain the appropriate Annual Notice and selected supporting materials for the specific plan.
- "ZIP: One Plan, All forms single file" - generates a zip file containing a single document with all Annual Notices and selected supporting materials for all plans in the batch. This will be a large file. You can expect to experience additional time for it to download and print.

Print Batch: **Sample Batch Test**

Batch Printed: ▼

Print Options: **ZIP: One Folder, All forms** ▼

Cover Letter: **ZIP: One Folder, All forms** Edit

Suppress Error Page: **ZIP: One folder per Plan, One file per form**

Documents / Forms **ZIP: One Plan, All forms single file** Select All / Deselect All

3. "Cover Letter" - Provides the option of using the "Default Annual Notice" cover letter. You can modify the letter by clicking on the "Edit" link next to the drop-down menu.

Print Batch: **Sample Batch Test**

Batch Printed: ▼

Print Options: **ZIP: One Folder, All forms** ▼

Cover Letter: **N/A** Edit

Suppress Error Page: **N/A**

Documents / Forms **Default Annual Notice Email** Select All / Deselect All

4. "Suppress Error Page" - gives the option of suppressing the error page. The error page generates as the first page of all documents when the checklist has not passed all edit checks.

Print Batch: **Sample Batch Test**

Batch Printed: ▼

Print Options: **ZIP: One Folder, All forms** ▼

Cover Letter: **N/A** Edit

Suppress Error Page: **No** ▼

Documents / Forms **No** Select All / Deselect All

Highlights **Yes** **Annual Notice**

After making your print selections, choose which supporting materials you would like to include, and click on the "Print" button at the bottom of the menu.

Print Batch: **Sample Batch Test**

Batch Printed: Update Print date

Print Options: ZIP: One Folder, All forms

Cover Letter: N/A Edit

Documents / Forms Select All / Deselect All

Highlights

☐ Plan Highlights

☐ Plan Highlights - Spanish

Model/Sample Amendments/Agreements

☐ Discretionary Match Sample Kit

Annual Notice

☐ Annual Notice

☐ Annual Notice - Spanish

☐ Annual Notice - SIMPLE 401(k)

☐ Annual Notice - SIMPLE 401(k) - Spanish

Forms

☐ Deferral Election Form

☐ Deferral Election Form - Spanish

Cancel

Print

PLEASE NOTE: If you have QDIA only plans, you will need to use DocPrint to print these notices as you cannot add plans to the Batch Annual Notice that do not require an Annual Notice.

In 403(b) Only batches, you can select to add the Universal Availability Notice, and 415 Notice.

The Discretionary Match Kit will only appear as an option if the plan requires it.