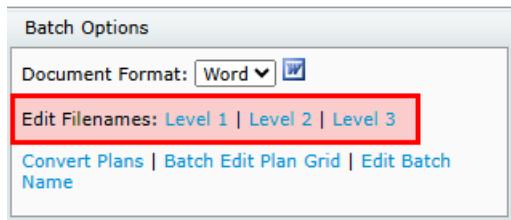


Printing Documents

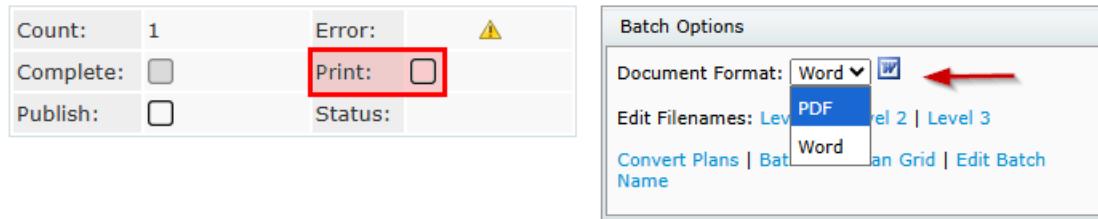
12/17/2025 8:52 am CST

Before printing your desired documents, you have the option to customize the file names via the Edit Filenames under the "Batch Options" menu.

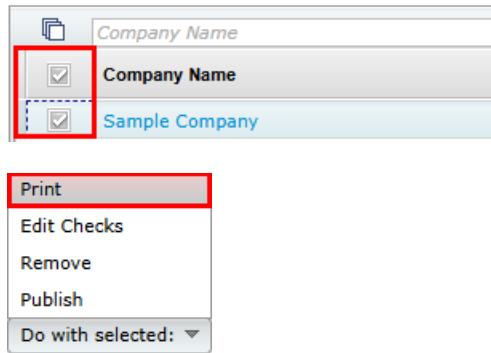
- Level 1 applies to the folder that is downloaded from DocPrint. This will contain plan folders and files for all the plans in your batch.
- Level 2 applies to the file or folder within the Zip folder in Level 1.
- Level 3 applies to all the files inside of the folders in Level 2.



To print your desired documents/forms, select your desired format and click on the "Print" checkbox.



You can also select plans from your list, then click on the "Do with selected".



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: DocPrint Test Batch

Batch Print Status:	Mark as Printed		
Download Option:	ZIP: One Folder, All forms		
Cover Letter:	N/A		
Suppress Error Page:	No		
Documents / Forms Select All / Deselect All			
Plan Document <input type="checkbox"/> Adoption Agreement <input type="checkbox"/> Blank Adoption Agreement <input type="checkbox"/> Joinder Agreement <input type="checkbox"/> Basic Plan Document <input type="checkbox"/> Trust Agreement Required Amendments * <input type="checkbox"/> SECURE/CARES/CAA Amendment <input type="checkbox"/> DC SECURE 2.0 Amendment 2025	Summary Plan Description <input type="checkbox"/> Summary Plan Description <input type="checkbox"/> Summary Plan Description - English Including Spanish Foreign Language Requirement <input type="checkbox"/> Summary Plan Description - Spanish Highlights <input type="checkbox"/> Plan Highlights <input type="checkbox"/> Plan Highlights - Spanish Administrative Policies <input type="checkbox"/> Loan Procedures <input type="checkbox"/> QDRO Procedures <input type="checkbox"/> Funding Policy <input type="checkbox"/> SECURE 2.0 Operation Checklist Model/Sample Amendments/Agreements <input type="checkbox"/> Consent <input type="checkbox"/> Amendment <input type="checkbox"/> Short Plan Year Amendment <input type="checkbox"/> Termination Kit non MP <input type="checkbox"/> Discretionary Match Sample Kit <input type="checkbox"/> Safe Harbor Non-Elective Amendment <input type="checkbox"/> Cease Safe Harbor Amendment <input type="checkbox"/> Cease Safe Harbor	Annual Notice <input type="checkbox"/> Annual Notice <input type="checkbox"/> Annual Notice - Spanish <input type="checkbox"/> Annual Notice - no QDIA <input type="checkbox"/> Annual Notice - no QDIA - Spanish <input type="checkbox"/> Annual Notice - QDIA only <input type="checkbox"/> Annual Notice - QDIA only - Spanish <input type="checkbox"/> Annual Notice - SIMPLE 401(k) <input type="checkbox"/> Annual Notice - SIMPLE 401(k) - Spanish Forms <input type="checkbox"/> Follow-up Notice <input type="checkbox"/> Deferral Election Form <input type="checkbox"/> Deferral Election Form - Spanish <input type="checkbox"/> Bonus Deferral Election Form <input type="checkbox"/> Self Employed Deferral Election Form <input type="checkbox"/> Publicly-Traded Stock Notice <input type="checkbox"/> Publicly-Traded Stock Notice - Spanish <input type="checkbox"/> Beneficiary Designation <input type="checkbox"/> Beneficiary Designation - Spanish <input type="checkbox"/> Rollover Contribution <input type="checkbox"/> Special Tax Notice <input type="checkbox"/> Special Tax Notice - Spanish	
		<input type="button" value="Cancel"/> <input style="border: 2px solid red;" type="button" value="Print"/>	

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

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

Print Batch: Sample Batch Test

Batch Printed:	Update Print date
Print Options:	Update Print date
Cover Letter:	Leave Unchanged
Suppress Error Page:	Mark as Not Printed
Documents / Forms Select All / Deselect All	

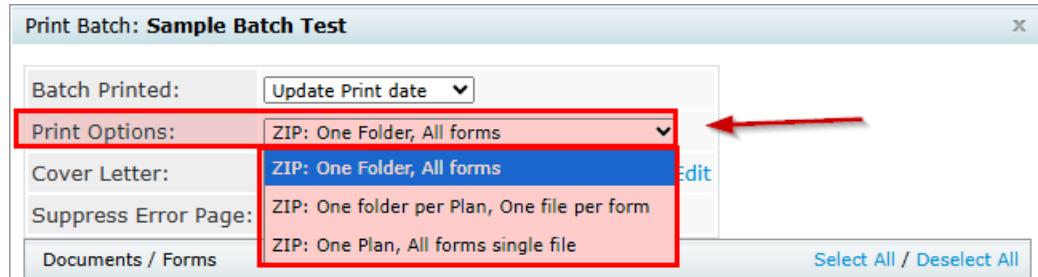
2. "Print Options" - Provides options to choose from on how documents/forms are printed.

- "ZIP: One Folder, All forms" - generates a zip file in a single folder for all plans in the batch.
- "ZIP: One folder per Plan, One file per form" - generates a zip file with individual folders for each plan in your batch.
- "ZIP: One Plan, All forms single file" - generates a zip file containing a single document with all selected documents/forms.

Print Batch: Sample Batch Test

Batch Printed:	Update Print date
Print Options:	ZIP: One Folder, All forms
Cover Letter:	ZIP: One Folder, All forms
Suppress Error Page:	ZIP: One folder per Plan, One file per form
Documents / Forms	ZIP: One Plan, All forms single file

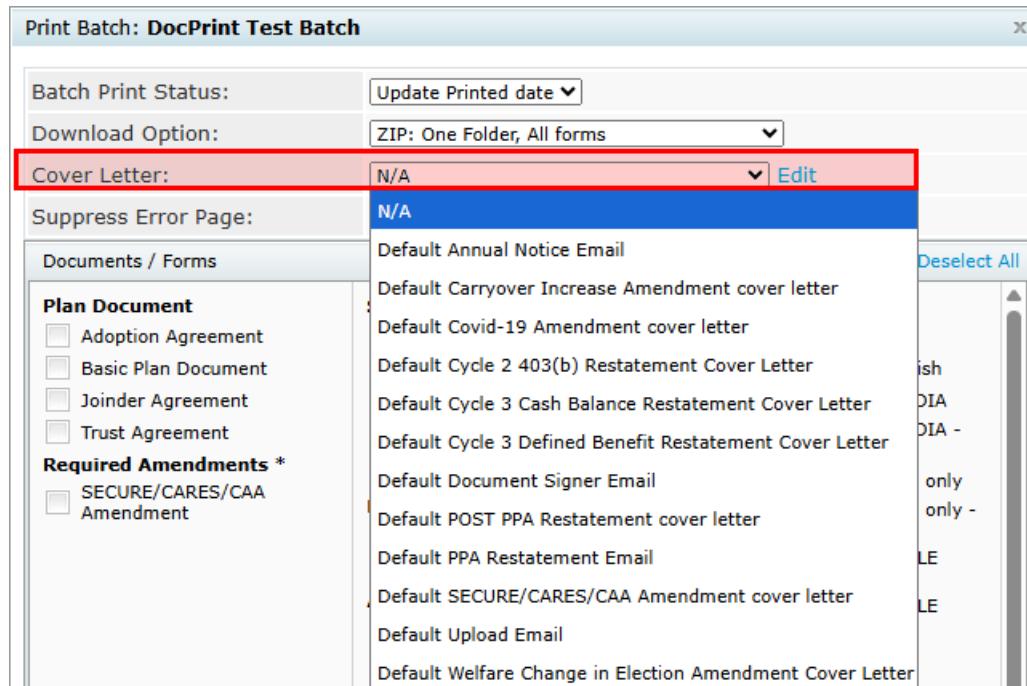
[Select All / Deselect All](#)



3. "Cover Letter" - Provides the option of using any of the default cover letters available. You can modify the letter by clicking on the "Edit" link next to the drop-down menu.

Print Batch: DocPrint Test Batch

Batch Print Status:	Update Printed date																																				
Download Option:	ZIP: One Folder, All forms																																				
Cover Letter:	N/A																																				
Suppress Error Page:	N/A																																				
Documents / Forms	<table border="1"><tr><td>Plan Document</td><td><input type="checkbox"/> Adoption Agreement</td><td>ish</td></tr><tr><td></td><td><input type="checkbox"/> Basic Plan Document</td><td>DIA</td></tr><tr><td></td><td><input type="checkbox"/> Joinder Agreement</td><td>DIA -</td></tr><tr><td></td><td><input type="checkbox"/> Trust Agreement</td><td>only</td></tr><tr><td>Required Amendments *</td><td><input type="checkbox"/> SECURE/CARES/CAA Amendment</td><td>only -</td></tr><tr><td></td><td></td><td>LE</td></tr><tr><td></td><td></td><td>LE</td></tr><tr><td></td><td></td><td>LE</td></tr><tr><td></td><td></td><td>LE</td></tr><tr><td></td><td></td><td>LE</td></tr><tr><td></td><td></td><td>LE</td></tr><tr><td></td><td></td><td>LE</td></tr></table>	Plan Document	<input type="checkbox"/> Adoption Agreement	ish		<input type="checkbox"/> Basic Plan Document	DIA		<input type="checkbox"/> Joinder Agreement	DIA -		<input type="checkbox"/> Trust Agreement	only	Required Amendments *	<input type="checkbox"/> SECURE/CARES/CAA Amendment	only -			LE																		
Plan Document	<input type="checkbox"/> Adoption Agreement	ish																																			
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Required Amendments *	<input type="checkbox"/> SECURE/CARES/CAA Amendment	only -																																			
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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:	Update Print date
Print Options:	ZIP: One Folder, All forms
Cover Letter:	N/A
Suppress Error Page:	No
Documents / Forms	No
Highlights	Yes

Select All / Deselect All

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: DocPrint Test Batch

Batch Print Status:	Mark as Printed	
Download Option:	ZIP: One Folder, All forms	
Cover Letter:	N/A	
Suppress Error Page:	No	
Documents / Forms	Select All / Deselect All	
Plan Document <input type="checkbox"/> Adoption Agreement <input type="checkbox"/> Blank Adoption Agreement <input type="checkbox"/> Joinder Agreement <input type="checkbox"/> Basic Plan Document <input type="checkbox"/> Trust Agreement Required Amendments * <input type="checkbox"/> SECURE/CARES/CAA Amendment <input type="checkbox"/> DC SECURE 2.0 Amendment 2025	Summary Plan Description <input type="checkbox"/> Summary Plan Description <input type="checkbox"/> Summary Plan Description - English Including Spanish Foreign Language Requirement <input type="checkbox"/> Summary Plan Description - Spanish Highlights <input type="checkbox"/> Plan Highlights <input type="checkbox"/> Plan Highlights - Spanish Administrative Policies <input type="checkbox"/> Loan Procedures <input type="checkbox"/> QDRO Procedures <input type="checkbox"/> Funding Policy <input type="checkbox"/> SECURE 2.0 Operation Checklist Model/Sample Amendments/Agreements <input type="checkbox"/> Consent <input type="checkbox"/> Amendment <input type="checkbox"/> Short Plan Year Amendment <input type="checkbox"/> Termination Kit non MP <input type="checkbox"/> Discretionary Match Sample Kit <input type="checkbox"/> Safe Harbor Non-Elective Amendment <input type="checkbox"/> Cease Safe Harbor Amendment <input type="checkbox"/> Cease Safe Harbor	Annual Notice <input type="checkbox"/> Annual Notice <input type="checkbox"/> Annual Notice - Spanish <input type="checkbox"/> Annual Notice - no QDIA <input type="checkbox"/> Annual Notice - no QDIA - Spanish <input type="checkbox"/> Annual Notice - QDIA only <input type="checkbox"/> Annual Notice - QDIA only - Spanish <input type="checkbox"/> Annual Notice - SIMPLE 401(k) <input type="checkbox"/> Annual Notice - SIMPLE 401(k) - Spanish Forms <input type="checkbox"/> Follow-up Notice <input type="checkbox"/> Deferral Election Form <input type="checkbox"/> Deferral Election Form - Spanish <input type="checkbox"/> Bonus Deferral Election Form <input type="checkbox"/> Self Employed Deferral Election Form <input type="checkbox"/> Publicly-Traded Stock Notice <input type="checkbox"/> Publicly-Traded Stock Notice - Spanish <input type="checkbox"/> Beneficiary Designation <input type="checkbox"/> Beneficiary Designation - Spanish <input type="checkbox"/> Rollover Contribution <input type="checkbox"/> Special Tax Notice <input type="checkbox"/> Special Tax Notice - Spanish

Cancel Print

