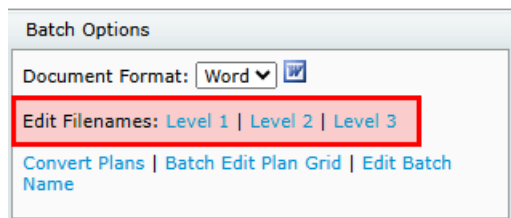


Printing Documents


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.



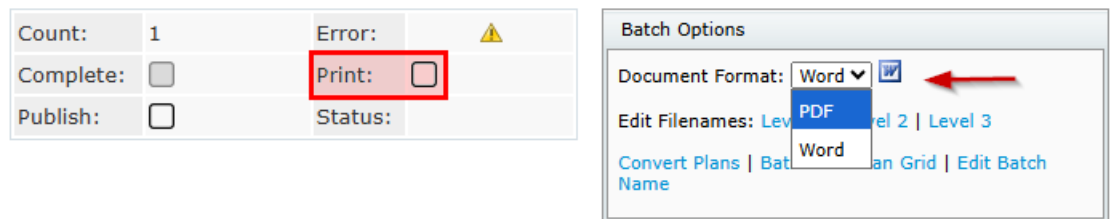
Batch Options


Document Format: Word 

Edit Filenames: [Level 1](#) | [Level 2](#) | [Level 3](#)


[Convert Plans](#) | [Batch Edit Plan Grid](#) | [Edit Batch Name](#)

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



Count:	1	Error:	
Complete:	<input type="checkbox"/>	Print:	<input type="checkbox"/>
Publish:	<input type="checkbox"/>	Status:	

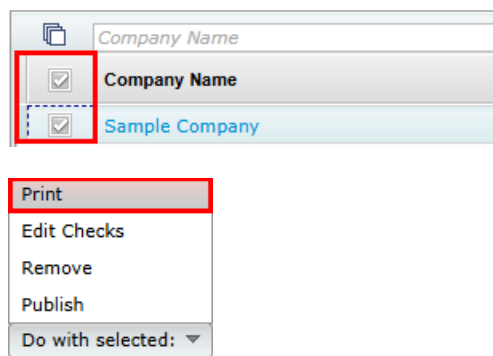
Batch Options

Document Format: Word 

Edit Filenames: [Level 1](#) | [Level 2](#) | [Level 3](#)

[Convert Plans](#) | [Batch Edit Plan Grid](#) | [Edit Batch Name](#)

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



Company Name

☒ Company Name

☒ Sample Company

Print

Edit Checks

Remove

Publish

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 [Edit](#)

Suppress Error Page: No

Documents / Forms Select All / Deselect All

Plan Document	Summary Plan Description	Annual Notice
<input type="checkbox"/> Adoption Agreement	<input type="checkbox"/> Summary Plan Description	<input type="checkbox"/> Annual Notice
<input type="checkbox"/> Blank Adoption Agreement	<input type="checkbox"/> Summary Plan Description - English Including Spanish Foreign Language Requirement	<input type="checkbox"/> Annual Notice - Spanish
<input type="checkbox"/> Joinder Agreement	<input type="checkbox"/> Summary Plan Description - Spanish	<input type="checkbox"/> Annual Notice - no QDIA
<input type="checkbox"/> Basic Plan Document		<input type="checkbox"/> Annual Notice - no QDIA - Spanish
<input type="checkbox"/> Trust Agreement		<input type="checkbox"/> Annual Notice - QDIA only
Required Amendments *	Highlights	<input type="checkbox"/> Annual Notice - QDIA only - Spanish
<input type="checkbox"/> SECURE/CARES/CAA Amendment	<input type="checkbox"/> Plan Highlights	<input type="checkbox"/> Annual Notice - SIMPLE 401(k)
<input type="checkbox"/> DC SECURE 2.0 Amendment 2025	<input type="checkbox"/> Plan Highlights - Spanish	<input type="checkbox"/> Annual Notice - SIMPLE 401(k) - Spanish
	Administrative Policies	Forms
	<input type="checkbox"/> Loan Procedures	<input type="checkbox"/> Follow-up Notice
	<input type="checkbox"/> QDRO Procedures	<input type="checkbox"/> Deferral Election Form
	<input type="checkbox"/> Funding Policy	<input type="checkbox"/> Deferral Election Form - Spanish
	<input type="checkbox"/> SECURE 2.0 Operation Checklist	<input type="checkbox"/> Bonus Deferral Election Form
	Model/Sample Amendments/Agreements	<input type="checkbox"/> Self Employed Deferral Election Form
	<input type="checkbox"/> Consent	<input type="checkbox"/> Publicly-Traded Stock Notice
	<input type="checkbox"/> Amendment	<input type="checkbox"/> Publicly-Traded Stock Notice - Spanish
	<input type="checkbox"/> Short Plan Year Amendment	<input type="checkbox"/> Beneficiary Designation
	<input type="checkbox"/> Termination Kit non MP	<input type="checkbox"/> Beneficiary Designation - Spanish
	<input type="checkbox"/> Discretionary Match Sample Kit	<input type="checkbox"/> Rollover Contribution
	<input type="checkbox"/> Safe Harbor Non-Elective Amendment	<input type="checkbox"/> Special Tax Notice
	<input type="checkbox"/> Cease Safe Harbor Amendment	<input type="checkbox"/> Special Tax Notice - Spanish
	<input type="checkbox"/> Cease Safe Harbor	

Cancel 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 [Edit](#)

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:

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 [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:

Download Option: ZIP: One Folder, All forms

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

Suppress Error Page: N/A

Documents / Forms [Deselect All](#)

Plan Document

- ☐ Adoption Agreement
- ☐ Basic Plan Document
- ☐ Joinder Agreement
- ☐ Trust Agreement

Required Amendments *

- ☐ SECURE/CARES/CAA Amendment

Default Annual Notice Email

Default Carryover Increase Amendment cover letter

Default Covid-19 Amendment cover letter

Default Cycle 2 403(b) Restatement Cover Letter

Default Cycle 3 Cash Balance Restatement Cover Letter

Default Cycle 3 Defined Benefit Restatement Cover Letter

Default Document Signer Email

Default POST PPA Restatement cover letter

Default PPA Restatement Email

Default SECURE/CARES/CAA Amendment cover letter

Default Upload Email

Default Welfare Change in Election Amendment Cover Letter


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:

Cover Letter: [Edit](#)

Suppress Error Page: 

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

Highlights **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:

Download Option:

Cover Letter: [Edit](#)

Suppress Error Page:

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
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