Steps for Documents Data Transfer

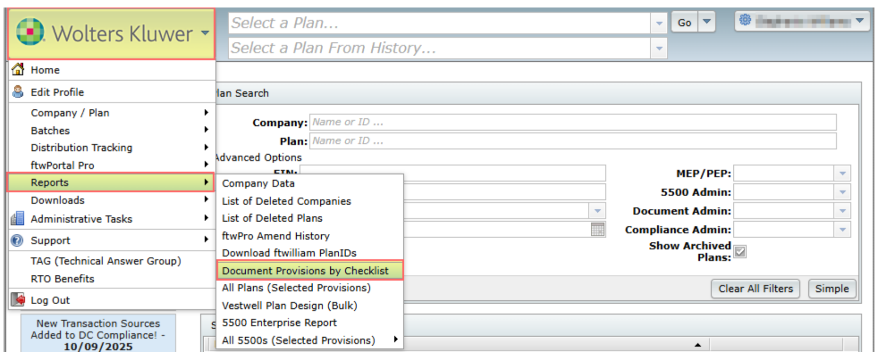
10/29/2025 11:06 am CDT

Below are the steps to assist you in **transferring plan document checklists** to or from another service provider (i.e. prior TPA) that also uses the FTW document software.

Please note, the user must have Admin level rights on their account to both download the report and upload the files.

FTW Account that currently holds the plan(s):

1. Download the report called "**Document Provisions by Checklist**". This report is in the Wolters Kluwer drop down menu under Reports.



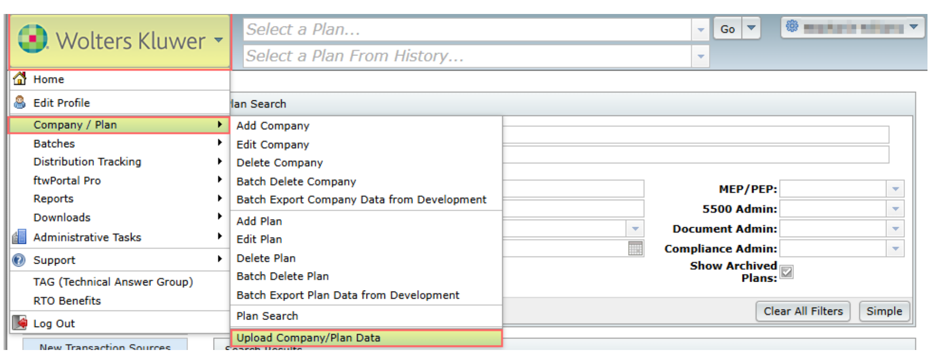
2. This report will include all plans that are on the selected checklist. Plans that will not be transferred should be deleted from this file. Save the file as a CSV file to your computer.

3. Former service provider will then send the saved file to the new service provider to upload to their account.

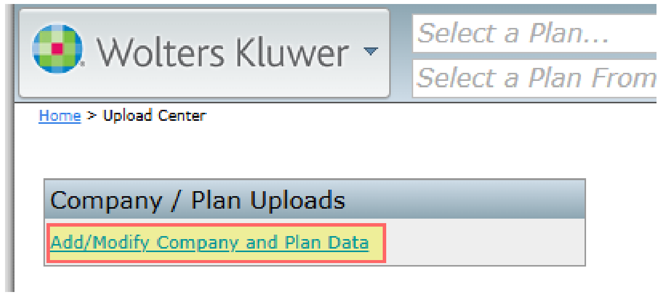
FTW Account that will be taking over the plan(s):

1. Upon receipt of the CSV spreadsheet from the prior service provider, the new service provider will upload the plan(s) via the Upload/Company Plan Data feature. From the Wolters Kluwer menu, select Company/Plan, followed by Upload Company/Plan Data.

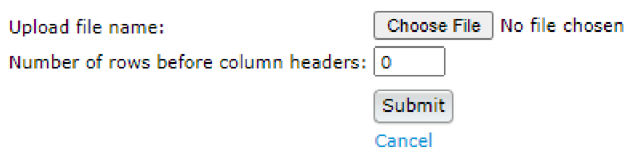
   NOTE: Do not make any changes to the file.



2. On the next page, click on Add/Modify Company and Plan Data.



3. At the bottom of the page, click on the “Choose File” button.
4. Select the CSV file that you saved to your computer.
5. Leave the number of rows as 0.
6. Click on the “Submit” button to upload the plans to your account.



Once the file has uploaded, you will find that plan via a Plan Search.