

5.7 Participant Menu

12/09/2025 3:00 pm CST

Participant Menu

From the Census screen, you can access the individual participant's data by selecting their name from the Participant Record dropdown or by clicking their name below the census grid in the "Active/Inactive Employees not on current year census".

Current Census Grid: * ftw Primary 1 Census (comp and comp after elig) (ID: c1eb549) [Change](#)

Census Data: [Download](#) | [Upload](#) | [Other Import/Export/Reports](#) | [Portal Files](#)

Miscellaneous

Tools/Settings

Plan Specifications

SSN: Last Name: First Name:

Search Participant Record

Add to Census

Four, Fantastic

Participant Record

Four, Fantastic

One, Every

Seven, Solid

Six, Surprise

Three, Terrific

Two, Terrible

Edit Participant Record

Remove From Census

Refresh Grid

Hire...	Date of Ter...	Term Reason (1)	Date of Hire...	Date of Ter...	Term Reason (2)
Help	Help	Help	Help	Help	Help
3					

Totals:


Active/Inactive Employees not on current year census:

Show Actives Only

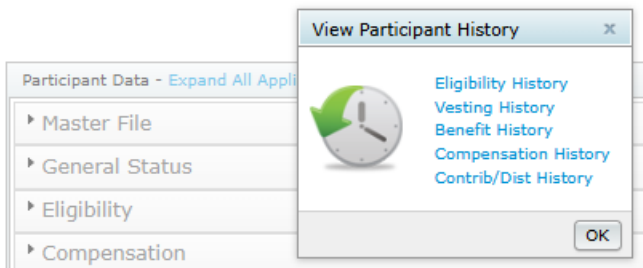
<input type="checkbox"/> Participant Name	Active	Make Active/Inactive	May Add to Census	SSN	Last Day Status
<input type="checkbox"/> Five, Favorite	Yes	Make Inactive	Add to census	111-11-1115	

You will be taken to the "Participant Menu" screen where you can access the View History and Vesting Override windows, as well as the Participant Data section.

View History

Company:	FTW Demo Company	ID:	
Plan:	FTW 401k Demo Company	ID:	
Year End:	12/31/2025	Plan Year Unlocked:	

Participant: **Four, Fantastic** [View History](#) | [Vesting Override](#)



Clicking "View History" will take you to the Participant History grids. The **Eligibility, Vesting, and Benefit History** grids all work in a similar manner. The grid shows the years of service and hours of service earned for each computation period year in the system as well as status change dates. The following example will illustrate how these grids operate:

A sample Eligibility history link is shown below for the 2024 testing year. The first field shown is the "Comp Period year End" which shows the computation period year end for which the status was calculated.

Service History - Eligibility

Plan: **An FTW 401k Demo 2024**
Name: **Tom Thumb**
SSN: **223-45-6789**

[Refresh the Grid](#)

	Comp Period ...	Status	Status date	Type	Hours	Service Earned	Census Proce...
1	2021-01-01	Hire	01/01/2021	A	0	0	2021-01-01
2	2021-12-31	ALL		E	1400	1	2021-12-31
3	2022-12-31	ALL		E	1400	1	2022-12-31
4	2023-12-31	ALL		E	1400	1	2023-12-31
5	2024-12-31	ALL		E	2080	1	2024-12-31

The next three columns taken together show the status, status date and type of record shown. The field "Type" indicates the type of status. There are two main categories of status types:

- A: General status change with a status of hire or term. "A" status types will not have corresponding hours of service.
- E, V or B: "E" = Eligibility; "V" = Vesting; and "B" = Benefit. These status types will have corresponding Statuses to indicate what type of contribution they pertain to ("ED" - elective deferrals, "MT" - Matching, "NE" - nonelective, or "ALL" - all contribution types).

The Hours column typically displays the hours from the census grid. The Service Earned column will indicate the years of service earned for the computation period.

The **Compensation and Contribution/Distribution History** grids include the Compensation History from previously uploaded census files in the Statutory and Nonelective Testing fields.

Compensation - History

Plan: **An FTW 401k Demo 2024**

Name: **Tom Thumb**

SSN: **223-45-6789**

[Close](#)

[Refresh the Grid](#) | [Download Spreadsheet](#)

	Comp Period Year E...	Type	Source	Statutory	Nonelective Testing	Processed
1	2024-12-31	Comp		21654.00	21654.00	2024-12-31

The Contribution/Distribution History grid has the same fields as the Compensation History grid but the contribution and distribution data is based on *posted transactions* in the Transactions module.

Vesting Override

The Vesting Override link allows you to override the source vesting percentage for a participant. Once the vesting percentage is overridden, the software will no longer calculate the vesting percentage for that employee.

Participant: **Four, Fantastic** [View History](#) | [Vesting Override](#)

Participant: Four, Fantastic

SourceID	Suppress	Source Name	Source Desc	Override	Vesting Percentage
MATCH	No	Matching Contribution	Matching Contribution	No ▾	<input type="text"/>
PS	No	Profit Sharing	Profit Sharing Contribution	No ▾	<input type="text"/>

CloseUpdate

Unless you are making an employee 100% vested, we recommend doing a years of service override using one of the *ftw grids in the Other Import/Export/Report menu instead of overriding vesting percentage.