Custom Edit Checks

04/30/2026 4:20 pm CDT

Edit checks are automated rules within the software that help ensure all required data is accurately entered in the Plan Checklist, catching errors or omissions by alerting users when information is missing or incorrect. Users with Designated Administrative permissions may create new custom edit checks tailored to their organization's specific needs, enhancing data integrity and flexibility.

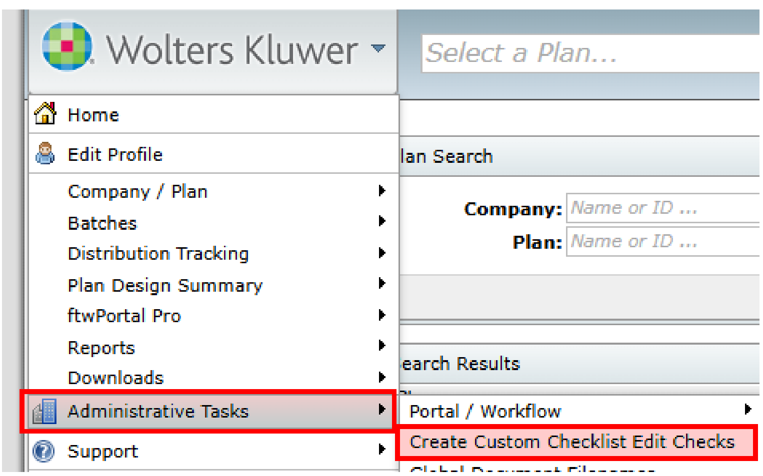
Accessing Custom Edit Checks

The steps below will guide you through accessing, managing, and creating custom edit checks, as well as utilizing dashboard functions and logic relationships.

Accessing Custom Edit Checks

Follow these steps to reach the Custom Edit Check Dashboard:

1. Log in to your ftwilliam.com account.
2. Navigate to the Wolters Kluwer menu at the top of the page.
3. From the drop-down, select Administrative Tasks.
4. Click on Custom Edit Checks to open the Custom Edit Check Dashboard.



Custom Edit Check Dashboard Overview

The Custom Edit Check Dashboard is the central hub for viewing, managing all system and custom edit checks, and where you can create custom edit checks. The dashboard is organized into columns, each representing key details about your edit checks:

- **Error ID**: The value assigned to identify each edit check. System generated Error IDs will have the format of FW-####. Custom Edit check Error IDs will have a format defined by the User of any combination of numbers or alpha characters.
- **Document Type:** Shows which document type is impacted by the edit check.

- **Version(s):** Shows which document cycle(s) are impacted.
- **Affected Checklists:** Shows which document checklist is impacted by the edit check.
- **Section:** Shows which section of the checklist the edit check applies to.
- **Go to Field:** The software will direct the User to go to the field listed in this column when the edit check is triggered.
- **Display Message:** Shows the message the User will see when the edit check is triggered.
- **Enabled:** Indicates whether the edit check is enabled ("Yes") or disabled ("No").
- **Options:** Depending on the type of edit check, Users will have the option of toggling between enable and disable.
- **Error Lvl:** Identifies the nature of the edit check (error or warning).
- **System:** Specifies if the edit check is system-generated ("Yes") or a custom edit check ("No").

Filtering and Sorting the Custom Edit Check Dashboard

To efficiently locate and organize edit checks:

- **Filtering:** You can enter criteria above each column to filter results. For example, to view only warning edit checks, you can type in the criteria "warning" above the "Error Lvl" column.
- **Removing Filters:** Click the “x” next to the filter applied.
- **Sorting:** Click the arrow on any column header to sort edit checks alphabetically or by date, depending on the column. Double click to sort in the opposite order.

Export Current View

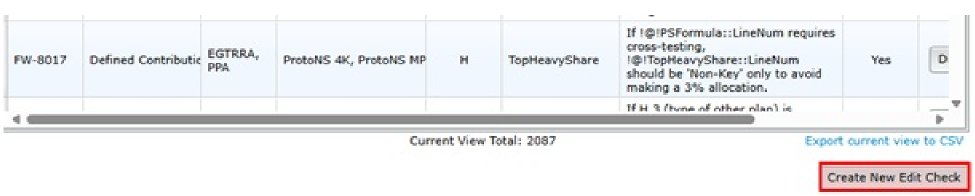
To export the current list of edit checks:

1. Apply any desired filters or sorting to the custom edit check dashboard view.
2. Click the Export to CSV link located below the dashboard.
3. Choose a destination on your computer to save the CSV file.

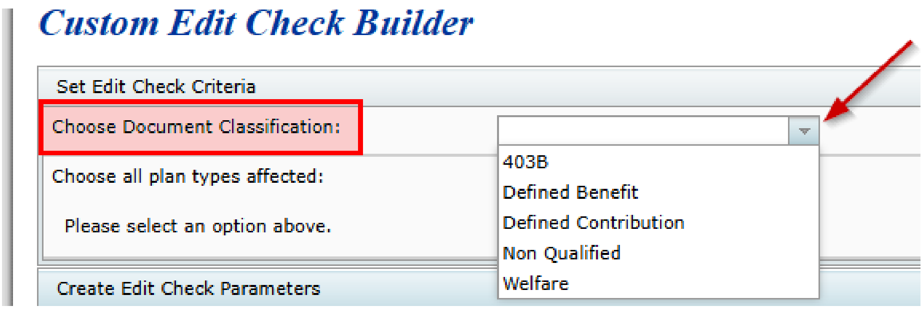
The exported file will reflect the current view, including any applied filters or sorting.

Creating a New Custom Edit Check

To create a new custom edit check, click on the "Create New Edit Check" button located below the dashboard.

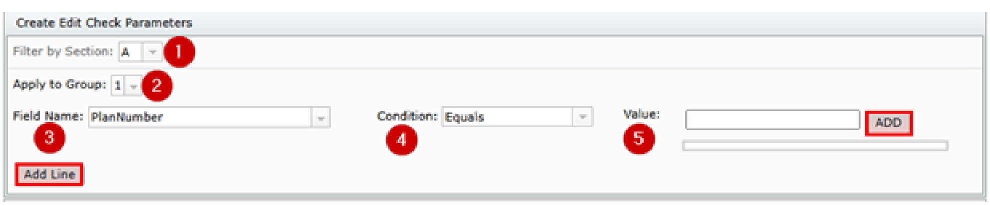


Choose Document Classification: From the drop-down select the document type to which the edit check will apply. Only one type may be selected per custom edit check.

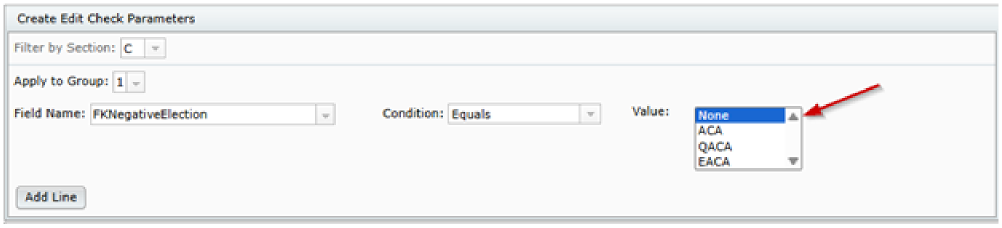


Choose all plan types affected: Specify which plan types (e.g., 401(k), Profit Sharing) the edit check should affect. To select multiple plan types, click on the plan type and Ctrl on your keyboard at the same time. You can also use the "Select All" button located under the "Possible Options" box. Click on the arrow button to move the plan type to the Selected Options box. When you are finished click on the Confirm button.

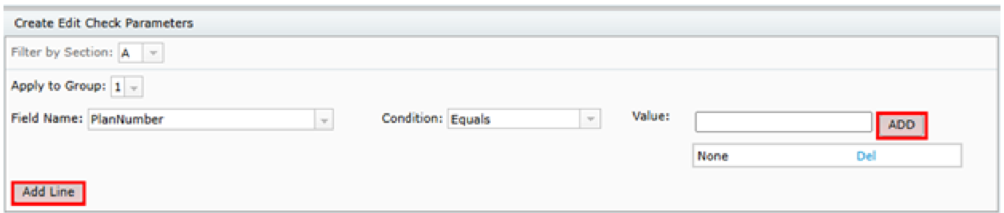
Create Edit Check Parameters: Choose the data fields and set conditions to create the edit check. Below is a description of each data field.



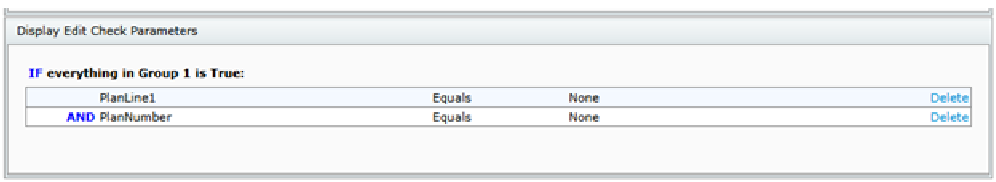
1. **Filter by Section:** Select from the drop-down the section of the checklist that the edit check will apply to (e.g. A).
2. **Apply to Group:** This is where you can determine the logic in relation to the criteria of the edit check. For a simple edit check with only one field and one value, the group number is not relevant. The grouping will determine if any (AND) or any (OR) conditions must be met involving multiple fields or values. Creating complex logic will be explained in greater detail below under Values.
3. **Field Name:** Select the name of the field from the drop-down that the edit check will look at. Only applicable fields to the plan type selected will be available.
4. **Condition:** From the drop-down select the condition to apply to the field name. ***Options include Less than, Equals, Not equal, Greater than, Less than, Greater or equal to, or Equal to.***
5. **Value:** To select one option, click on the given value, then click on the "Add Line" button. To select multiple options, hold the Ctrl button on your keyboard, at the same time select multiple options from the list. ***NOTE: Selecting multiple options in a list will have "or" relationship logic.***



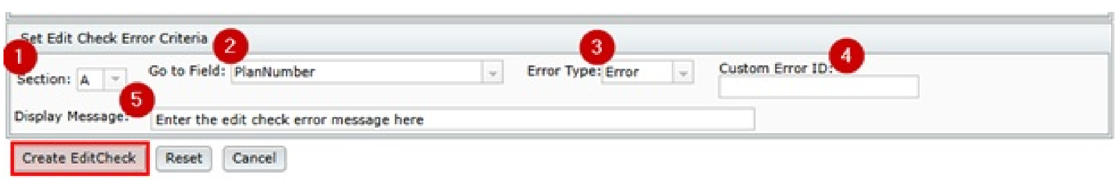
You can also add a value manually. The value can be numeric, alpha character or special character. After adding a value manually, click on the "Add" button to display the amount entered in box below the "Value" field. Click on the "Add Line" button to add the check to the Display Edit Check Parameters. You may now add another value and click on the "Add" button again, followed by "Add Line" when finished.



Display Edit Check Parameters: This will display your custom edit checks created after clicking on the "Add Line" button. If more than one line has been added, the lines will have an "and" or an "or" relationship based on the grouping and method of adding.



Set Edit Check Error Criteria

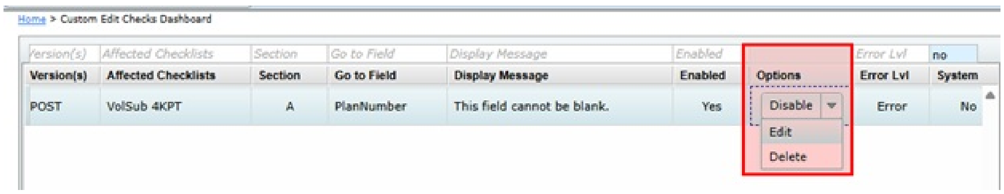


1. **Section:** Select the section that the edit check applies to (e.g. A).
2. **Go to Field:** Select the field that the user will be directed to when the error or warning message is received.
3. **Error Type:** Designate whether the edit check is classified as a warning or an error.
4. **Warning:** Alert the user but allows completion. These will be highlighted in yellow.
5. **Error:** Alerts the user that the selection does not pass. These will be highlighted in red.
6. **Custom Error ID:** This is where you can enter an identification number specific to the edit check. The value can be numeric, alpha character or combination of both. You can use the same error ID for all edit checks or use a unique ID for every edit check.
7. **Display Message:** Enter language here to alert the user of edit check warning or error.

Create Edit Check: Click this button to save the edit check and return to the Custom Edit Check Dashboard. **Reset:** Click this button to reset and start over creating a custom edit check. **Cancel:** Click this button to cancel creating the edit check and return to the Custom Edit Check Dashboard.

Managing Custom Edit Checks

On the Custom Edit Checks Dashboard under the Options" column, you can manage custom edit checks.



- **Disable/Enable:** Users can disable an active edit check or enable an inactive edit check.***PLEASE NOTE: the button requires to be pressed vs selecting from the drop-down. Disabled checks will not run during document validation.***
- **Edit:** From the drop-down, select "Edit" to edit an existing custom edit check.
- **Delete:** From the drop-down arrow, select "Delete" to delete a custom edit check. System edit checks cannot be deleted.