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| **Topic** | **Question** | **Answer** |
| Census | Is there a way those prior year terms can be flagged so we can easily delete those rows before sending to client | There is not a push button selection. Just to clarify, the ppts who were not in the census last year (prior year terms) will not be in the file downloaded.  |
| So each year before the census is downloaded from the prior year you will need to take all prior terminees? | No; you would remove them from the census file you receive back from your client where they would not have current comp or hours. When you upload the census file without the prior terms in the file, the names will move to below the census grid.  |
| is there a list somewhere of the various things to "toggle off" after the first year | No; most are automatic or are visible on the screen where you need to make the selection.  |
| Is there a way to get the date of hire and date of termination information included on the census download grid for the census request?  | Not currently, since the dates are already in the system, they don’t need to be uploaded again. However this is on our enhancement it’s as it’s something a number of users have asked for. |
| Are prior year terms with a balance also supposed to be below the grid? | Yes; make sure the record remains ‘Active’. |
| Reports | Is there a way to make these new report changes and formatting on the global level?  | You may print the modified report for the current plan, or safe it for use with any plan. Please see the instructions in the User Guide. |
|  | Is the form customization available globally | Only a few reports are currently in the new custom report writer. More will be available in 2018. |
| Payroll Data | Can our clients upload the payroll data?  | Not currently; only ftw users can upload the data. |
| Can you run an allocation (e.g. to calculate match) after each payroll upload? | Not currently, but this is a planned enhancement |
| Distribution Module | What is the purpose of this addition?  | It will be used mostly for balance forward plans. It will compute the vested balance &/or forfeitures and break them down by source & investment account, AND create transactions. It will also produce the transactions for lesser amounts, and fees associated with the distributions.  |
| Will this deny unallowable distributions? | Not currently.  |
| Other | Is there a vendor upload for Alerus yet? I think it was in the works.  | Yes; we anticipate releasing the Alerus upload link by the end of the year.  |
| Would the top heavy min allocation take into account any existing ER contribution (i.e. match)? | Any nonelective contributions are automatically taken into account. For match to be counted, the option: ‘Include Match in Top Heavy minimums for Non Keys’ needs to be set to Yes; this is in the Top Heavy section of allocation parameters. |