

WELCOME!

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Administration Software
Users Group Meeting

Meeting #7 - April 2, 2013

Today's Agenda

- Demonstrate 8955-SSA Export Menu
- Discuss Advanced Classroom Training
- Demonstrate how to use the Forum
- Open discussion

8955-SSA Export Menu

- Data Requirements
- Create SSA Transfer Records
- Review/Edit SSA Transfer Records
- Transfer SSA Data to 5500 System

8955-SSA – Data Requirements

- To determine who should be on the SSA, the system uses the following data:
 - Participant's termination date
 - Participant's vested account balance
(statements must be run for the account balance to be recognized)
 - Participant forfeitures/distributions
(from the Transaction/Statement Menu)

8955-SSA Export Menu

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Home | Help | Support | Admin Menu | Log out

Plan Administration Menu

Company: test company
Plan: test plan
Plan Type: 401(k)
Year End: 2012-12-31 [Change Year End](#) [Add New Year End](#) [Delete This Year End](#)

[Return](#)

Select Task

[Edit Census](#) | [Review Docs](#) | [Fedral](#) | [Download Current](#) | [Download Prior](#) | [Upload Census](#)

Other Import/Export/Reports

Scrub/Eligibility Parameters	Do Data Scrub/Elig Calc (Run)	Print Reports
Set Allocation Parameters	Do Allocations (Not run)	Print Reports
Set Combined Test Parameters	Do Combined Test (Not run)	Print Reports
Set ADP/ACP Testing Parameters	Do ADP/ACP Test (Not run)	Print Reports
Set General Test Parameters	Do General Test (Not run)	Run Combined
Set Top Heavy Test Parameters	Do Top Heavy Test (Not run)	Print Reports

Printing Parameters/Client Package

Set Printing Parameters	Select Reports	Print Package
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Miscellaneous Tasks

8955-SSA Export Menu	1099-R Export Menu
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Form 8955-SSA Export

Company: test company
Plan: test plan
Year End: 2012-12-31

Form 8955-SSA - Create SSA Transfer Records

CAUTION: This will delete any SSA transfer records for the plan or all plans (depending on whether the function is called for all plans or for a single plan). Select the Plan Month/Year End that matches the the year of the 8955-SSA you wish to export.

Select Plan Month/Year End: 12 / 2011

Also select which year to use when finding terminated participants.

Select Termination Year: Current Year

[Calculate for This Plan](#) [Calculate for All Plans](#)

Form 8955-SSA - Review/Edit Transfer Records

Select the Plan Month/Year End that matches the the year of the 8955-SSA Transfer Records.

Select Plan Month/Year End: 12 / 2011

Select type of report: Web page

[This Plan](#) [All Plans](#)

Form 8955-SSA - Transfer SSA Data to 5500 System

CAUTION: Selecting 'Automatic Push' will delete any 8955-SSA records in the 5500 system for the plan or all plans (depending on whether the function is called for all plans or for a single plan). Selecting 'Create csv' will create a spreadsheet that can be manually uploaded to the 5500 system for the plan or all plans (depending on whether the function is called for all plans or for a single plan). Select the Plan Month/Year End that matches the the year you wish to transfer

Select Plan Month/Year End: 12 / 2011

Select mode of transfer: Create csv

[This Plan](#) [All Plans](#)

Form 8955-SSA – Create SSA Transfer Records

- Select Plan Month/Year End of the Form
- Select Termination Year of participants
- Calculate for This Plan/ Calculate for All Plans

Please Note: Any existing SSA transfer records for the plan or for all plans (as selected by user) will be overwritten when new transfer records are created.

Form 8955-SSA - Create SSA Transfer Records

CAUTION: This will delete any SSA transfer records for the plan or all plans (depending on whether the function is called for all plans or for a single plan).

Select the Plan Month/Year End that matches the the year of the 8955-SSA you wish to export.

Select Plan Month/Year End 12 ▼ / 2012 ▼ ←

Also select which year to use when finding terminated participants.

Select Termination Year Current Year ▼ ←

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Form 8955-SSA –Review/Edit SSA Transfer Records

- Select Plan Month/Year End you wish to edit
- Select the type of report (csv. or web page)
 - csv. is a review only option
 - Web page option allows you make edits directly into the system.

Form 8955-SSA - Review/Edit Transfer Records

Select the Plan Month/Year End that matches the the year of the 8955-SSA Transfer Records.

Select Plan Month/Year End 12 ▼ / 2012 ▼ ←

Select type of report Web page ▼ ←

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Form 8955-SSA –Transfer SSA Data to 5500 System

- Select Plan Month/Year End you wish to transfer
- Select mode of transfer
 - Create csv – Prints the results to a csv (excel) file to be uploaded into the 8955-SSA.
 - Automatic Push – Transfers data directly to 8955-SSA.

Form 8955-SSA - Transfer SSA Data to 5500 System

CAUTION: Selecting 'Automatic Push' will delete any 8955-SSA records in the 5500 system for the plan or all plans (depending on whether the function is called for all plans or for a single plan).

Selecting 'Create csv' will create a spreadsheet that can be manually uploaded to the 5500 system for the plan or all plans (depending on whether the function is called for all plans or for a single plan).

Select the Plan Month/Year End that matches the the year you wish to transfer

Select Plan Month/Year End 12 ▼ / 2012 ▼

Select mode of transfer Create csv ▼

Form 8955-SSA - Transfer This Plan or All Plans

- Warning: If you have completed 8955-SSA's already you may not want to Transfer SSA Data for All Plans as this will overwrite all SSA's previously completed!

Form 8955-SSA - Transfer SSA Data to 5500 System

CAUTION: Selecting 'Automatic Push' will delete any 8955-SSA records in the 5500 system for the plan or all plans (depending on whether the function is called for all plans or for a single plan).

Selecting 'Create csv' will create a spreadsheet that can be manually uploaded to the 5500 system for the plan or all plans (depending on whether the function is called for all plans or for a single plan).

Select the Plan Month/Year End that matches the the year you wish to transfer

Select Plan Month/Year End

12 ▼ / 2012 ▼

Select mode of transfer

Create csv ▼

This Plan

All Plans

Advanced Classroom Training in May

- **Provisional topics include:**
 - Online questionnaire
 - Advanced census grid training
 - Initial eligibility
 - Cross-tested plans
 - Plan aggregation
 - Loans
 - Problematic plan specifications
 - 8955-SSA Export Menu & 1099-R Export Menu
- **When:** May 16 & 17, 2013
- **Where:** Chicago IL Suburbs at the Northern Illinois University: Naperville
1120 East Diehl Road, Naperville, IL
- **Who:** Advanced Wolters Kluwer Law & Business ftwilliam.com DC
Administration Software Customers
- **Cost:** \$299 per registrant

New Tool for the User Group

- Admin software users forum
 - Accessed through Zendesk
 - Users will need to update their account & create a password
- This will eventually be extended to all admin users
- Forum for other software modules will follow

Log in to ftwilliam.com support

Email address

Sign in using



Password

or

(Help! I don't know what to enter here!)

Remember me on this computer

Log in

New to ftwilliam.com support?

[Sign up to submit and track your requests online. »](#)

No password?

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

- <https://ftwilliam.zendesk.com>
- If you have emailed support previously you are already registered
- Click the link to create a password
- You will receive an email with a link to a website to set a password

Forum Policies

- Ftwilliam.com will:
 - Moderate discussions and categorize postings
 - Follow up directly with users if incorrect or inappropriate comments are made
 - Not police every comment but will remove abusive/inappropriate comments and may rescind user privileges
- We respectfully request that the forum not be used as an advertising medium

LET'S TAKE A LOOK AT
THE FORUM

<https://ftwilliam.zendesk.com>

Open Discussion

- Next meeting is Tuesday, May 7, 2013
 - Please feel free to suggest and lead a topic
 - Ideas for future agenda items?
- Vendor import files – please share your tips for using
- Questions, ideas, suggestions.....
- Thank you for attending!