

WELCOME!

Ft William.com
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 Meny | Log out

Print Reports

Print Reports

Print Reports

Print Reports

Print Reports

Print Reports

Frint Package

Run Combined

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

Do Data Scrub/Elig Calc (Run)

Do Allocations (Not run)

Do Combined Test (Not run)

Do ADF/ACP Test (Not run)

Do General Test (Not run)

Select Reports

Do Top Heavy Test (Not run)

Return

Select Task

Edit.Census | Beview.Doos | Eortal | Download.Current | Download.Prior | Upload

Consus

Other Import/Export/Reports

Scrub/Eligibilty Parameters

Set Allocation Parameters
Set Combined Test Parameters

Set ADP/ACP Testing Parameters

Set General Test Parameters

Set Top Heavy Test Parameters

Printing Parameters/Client Package

Set Printing Parameters

Miscellaneous Tasks

8955-SSA Export Menu

1099-R. Export Henu

AND Data Except

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 Honth/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 Honth/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.

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 Honth/Year End

12 - / 2011 -

Select mode of transfer

Create csv

This Plan

All Plans



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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

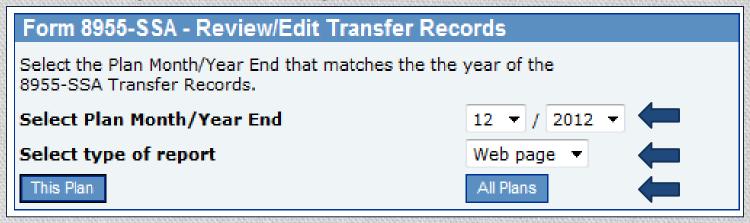
Please Note: Any existing SSA transfer records for the plan or for all plans (as selected by user) will be overwritten when new transfer records are created.

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 ▼
Calculate for This Plan	Calculate for All Plans



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 –Transfer SSA Data to 5500 System

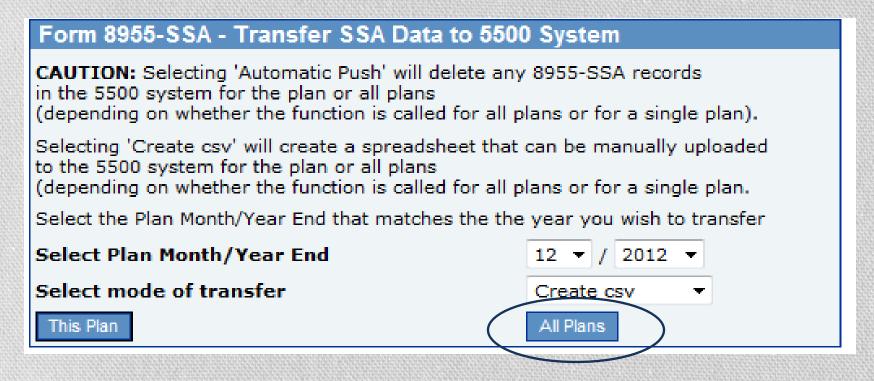
- Select Plan Month/Year End you wish to transfer
- Select mode of transfer
 - > Create csv Prints the results to a csv (excel) file to be uploaded into the 8955-SSA.
 - ➤ Automatic Push Transfers data directly to 8955-SSA.

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 ▼
This Plan	All Plans



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 <u>All Plans</u> as this will overwrite all SSA's previously completed!





Advanced Classroom Training in May

Provisional topics include:

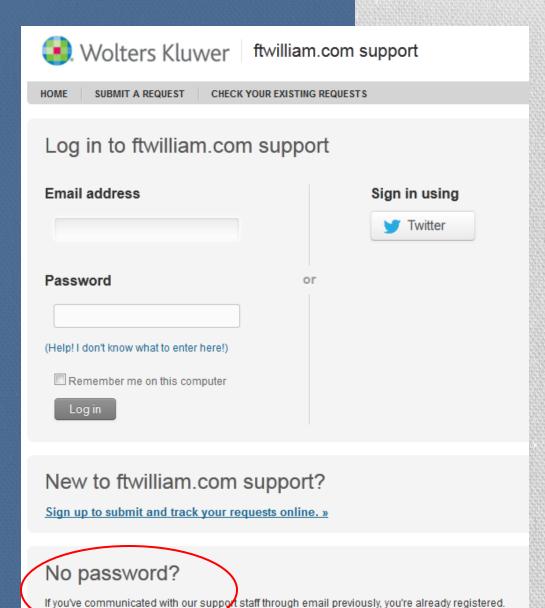
- > Online questionnaire
- Advanced census grid training
- Initial eligibility
- Cross-tested plans
- Plan aggregation
- > Loans
- Problematic plan specifications
- > 8955-SSA Export Menu & 1099-R Export Menu
- When: May 16 & 17, 2013
- Where: Chicago IL Suburbs at the Northern Illinois University: Naperville 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





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!

