Integrating ftwilliam.com with PensionPro

PensionPro recognizes that ftwilliam.com is an indispensable tool for many Third-Party Administrators; it is not at all uncommon to use PensionPro and ftwilliam.com side-by-side. To enhance both applications and allow greater functionality when used in conjunction, PensionPro offers the ability to integrate with ftwilliam.com. These integration features allow data to be easily linked and shared between the two applications.

Tier Availability: Team, Business
Security Rights Required: Maintenance

Integration Setup

To link information between PensionPro and ftwilliam.com, API Sign-In Credentials must be obtained from ftwilliam.com. These Credentials contain two items: an API Key and an SSO Source Reference. An API key is mandatory for setting up the integration. An SSO Source Reference is optional, but enables the following features:

- Form 5500 filing through PlanSponsorLink
- ftwilliam.com Navigation Assistance functionality

[Select this link to open a pre-formatted request email](). This email is addressed to ftwilliam.com for the purposes of requesting an API Key, as well as an SSO Source Reference, if applicable.

Entering the FTW API Credentials in PensionPro

1. Upon receipt of API credentials from ftwilliam.com, return to PensionPro. From the Navigation Panel, select **Maintenance** > **Preferences** > **Integrations** > **ftwilliam.com**.
2. Select **Edit** at the top-right of the settings grid. The **Edit ftwilliam.com Settings** window displays.
3. In the *API Key* field, enter the API Key provided by ftwilliam.com.
4. If an SSO Source Reference was provided, enter it into the *SSO Source Reference* field.
5. Select **Save**.

Upon saving the settings, the **Verified** field will indicate **Yes** if a correct API Key has been entered.

Settings

In addition to API Key and SSO Source Reference, the following settings can be enabled or disabled in the General view:

PSL SSO Enabled

This stands for PlanSponsorLink Single Sign-On Enabled. Set to **Yes** if Clients will be directed to PlanSponsorLink to sign their Form 5500. Enabling this feature links the ftwilliam.com 5500 Portal to PlanSponsorLink; in other words, a signer using PlanSponsorLink will be able to log in directly to ftwilliam.com from PSL to sign their Form 5500.

Government Forms Enabled

Set to **Yes** to allow the integration and linking of information between PensionPro and ftwilliam.com's Form 5500 software. Once enabled, fields from the **Filings** view of the **Plan Cycle** tab in PensionPro populate following completion on ftwilliam.com. These fields update on an hourly basis:

- 5500 Invited Date
- Sponsor Signed Date
- Admin Signed Date
- DFE Signed Date
- 5500 Filed Date

- 5500 Accepted Date
- Sign Status
- Acceptance Status
- 5558 Filed Date

To access these fields in PensionPro, open the desired **Plan** and select the **Plan Cycles** view. Double-click the desired Plan Cycle record in the grid to open a **Plan Cycle tab** and select the **Filings** view.

Additionally, with this option enabled, PensionPro can back-fill the above Form 5500 information for any Plan that meets the following criteria:

- A Plan Cycle exists in PensionPro
- The filing information for that Plan Cycle existed in ftwilliam.com prior to integration

After a link between Client and Plan information has been established between the two applications, the above information will generally be populated in PensionPro within 72 hours. To sync the corresponding Plan Record, both an Employer Data record (under the Client) and a Plan Cycle record (under the Plan) must have the same Period Start Date as the 5500 that was filed for the Plan.

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Compliance Enabled

Set to **Yes** to allow the integration and linking of information between PensionPro and ftwilliam.com's compliance software. Set this option to **No** if ftwilliam.com's compliance software is not being used.

Once enabled, fields from the **Test Results** view of the **Plan Cycle** tab in PensionPro populate following completion on ftwilliam.com. These fields update on an hourly basis:

- ADP
- ACP
- 401(a)(4) General Nondiscrimination
- Top Heavy
- 415 Limit

- 404 Deduction Limit
- 410(b) Coverage – 401(k)
- 410(b) Coverage – ER Match
- 410(b) Coverage – ER PS

To access these fields in PensionPro, open the desired **Plan** and select the **Plan Cycles** view. Double-click the desired Plan Cycle record in the grid to open a **Plan Cycle tab** and select the **Test Results** view.

As with the **Government Forms Enabled** option, PensionPro can automatically populate these fields with data from ftwilliam.com. Refer to the description for this option (found above) for requirements.

Create Records in ftwilliam.com

Set to **Yes** to allow Client, Plan, and Contact information to be created in ftwilliam.com via the PensionPro user interface. Information that can be created in ftwilliam.com through PensionPro is as follows:

- Client Fields
  - Company Name
  - Client Address
  - Client ID
  - Phone Number
  - Entity Type
  - EIN
  - Fiscal Year-End

- Plan Fields
  - Plan Name
  - Plan Type
  - Checklist
  - IRS Plan Number
  - Plan Year-End
  - Trust EIN

Update Records in ftwilliam.com

Set to **Yes** to allow certain information that is updated in PensionPro to also be updated in ftwilliam.com. *Company Name, Client ID, Plan Name,* and *TPA Plan ID* are synced fields that will update on ftwilliam.com if changed in PensionPro.

Enable ftwilliam.com Navigation Assistance

Set to **Yes** to allow users to easily create and link records in ftwilliam.com from certain views within PensionPro.

Enable the Import Specifications Button on Plan Document

Set to **Yes** to allow the integration and linking of information between PensionPro and ftwilliam.com's Plan Document software. Enabling this feature allows users to import a Plan's Document Specifications from ftwilliam.com into PensionPro.

Using PensionPro to Create Records in ftwilliam.com

The integration option to create records is used when a Client, or Plan exists in PensionPro, but does not exist within ftwilliam.com. This article assumes familiarity with Client, Plan, and Contact creation within PensionPro.

Adding a New Client to ftwilliam.com

1. Create a new **Client** in PensionPro and open the record in a new **Client tab**.

2. From the **General** view of the Client tab, select **More** ⋮ > **Create New ftwilliam.com Integration**.

Adding a New Plan to ftwilliam.com

A Plan cannot be created or linked to ftwilliam.com until its corresponding Client has been created or linked.

1. Create a new **Plan** in PensionPro and open the record in a new **Plan tab**.

2. From the **General** view of the Plan tab, select **More** ⋮ > **Create New ftwilliam.com Integration**.

Linking Records Between PensionPro and ftwilliam.com

The integration option to link records is used when separate records for the same Client, Plan, or Contact already exist in both ftwilliam.com and PensionPro.

Linking to an Existing ftwilliam.com Client

1. Use the Search bar in PensionPro to locate the Client and open the **Client tab**.
2. From the **General** view of the Client tab, select **More⋮** > **Link Client to ftwilliam.com**.
3. In the **Link ftwilliam.com Company** window, use the *Company to Link* field to search for the existing ftwilliam.com company.
4. Select the correct company from the dropdown list that populates beneath the *Company to Link* field.
5. Select **Save**.

Linking to an Existing ftwilliam.com Plan

1. Use the Search bar in PensionPro to locate the Plan and open the **Plan tab**.
2. From the **General** view of the Plan tab, select **More⋮** > **Link Plan to ftwilliam.com**.
3. In the **Link ftwilliam.com Plan** window, use the *Plan to Link* field to search for the existing ftwilliam.com plan.
4. Select the correct plan from the dropdown list that populates beneath the *Plan to Link* field.
5. Select **Save**.

Linking to an Existing ftwilliam.com 5500 Signer

Unlike with Clients and Plans, it is not possible to create a new 5500 Signer/Portal User in ftwilliam.com from PensionPro. However, Plan Contacts in PensionPro can be linked to Portal Users in ftwilliam.com.

Linking a Contact and Portal User between PensionPro and ftwilliam.com is only necessary if the Client uses PlanSponsorLink and the TPA wants to direct their Clients to PlanSponsorLink to file the Form 5500.

To link to a 5500 Signer/Portal User, the following criteria must be met within ftwilliam.com:
- The Portal User must be linked to the correct Plans, and be linked to the correct year(s) within those Plans.
- The Portal User must possess the correct rights and signing role.
- The Portal User cannot exist more than once.

Additionally, the following criteria must be met within PensionPro:

- The Contact must be Active.
- The Contact must have an email address that matches the Portal User's email address in ftwilliam.com.
- The Plan(s) the Contact is assigned to must be Active.
- The Plan must have a Plan Cycle Year(s) that matches the Plan year(s) being linked to in ftwilliam.com.
- The Plan, as well as the Client, must already be linked to ftwilliam.com.
- The Contact must be assigned to a Plan as a Contact Role.

If this criteria is met, a Contact may be linked:

1. In PensionPro, open the desired **Contact tab** via the Search feature, or from the Contact Roles view of any relevant Plan tab.

2. From the **General** view of the Contact tab, select **More⋮** > **Link Contact to ftwilliam.com**

3. In the **Link Contact** window, enter the **Year** which corresponds to the Plan Year the Portal User is assigned to in ftwilliam.com.

4. In the **Contact Name** field, search for the name of the Portal User.

5. Select the correct user from the dropdown list that populates beneath the *Contact Name* field.

6. Select **Link Contact**.

Upon a successful link, the Contact's ftwilliam.com username will appear on the General view of the Contact tab in the *ftwilliam.com Portal Username* field.

Once a Contact has been linked, the **Sign My 5500** button should appear in the upper-right corner of the My Active Tasks screen of PlanSponsorLink. Selecting this button will take the Contact to the ftwilliam.com site for signing. Any 5500 forms the Contact is required to sign will display on that page.

The "Sign My 5500" Checklist

Ensure that the following conditions have been met. If they haven't been met, the **Sign My 5500** button will not appear on PlanSponsorLink.

- From the Navigation Panel, select **Maintenance** > **Preferences** > **Integrations** > **ftwilliam.com** and confirm that the *PSL SSO Enabled* value indicates **Yes** (this enables the plan sponsor to see the Sign My 5500 button on the portal).
- Confirm that the Contact is not set up multiple times in ftwilliam.com.
- Confirm that the Contact is set up as a signer in ftwilliam.com and their email address in ftwilliam.com matches their email address in PensionPro.
- Confirm the Client is linked by navigating to the **General** view of the **Client** tab.
    - If linked, the value listed for *ftwilliam.com Integration* will be Yes.
- Confirm the Plan is linked by navigating to the **General** view of the **Plan** tab.
    - If linked, the value listed for *ftwilliam.com Integration* will be Yes.
- Confirm the Contact is linked by navigating to the **General** view of the **Contact** tab.
    - If linked, the *ftwilliam.com Portal Username* field displays the Contact's ftwilliam.com username.
- Confirm that this is the correct FTW Portal Username for the signer.

Additional Resources

The information presented in this document was condensed from the following articles available on the PensionPro Help Center:

- [ftwilliam.com Integration - Setup & Preferences](#)
- [ftwilliam.com - Creating and Linking Records from PensionPro](#)

Refer to these pages for further details, frequently asked questions, and up-to-date content.