

# 5.5. Other Import/Export/Reports

12/09/2025 2:06 pm CST

Other Import/Export/Reports can be accessed from the Compliance Menu by hovering over Census and selecting Other Import/Export/Reports or from within the Census screen, by clicking the Other Import/Export/Report link.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [Compliance](#) > [Census](#) > Other Import/Export/Report Menu

Company: FTW Demo Company ID:  
Plan: FTW 401k Demo Company ID:  
Year End: 12/31/2025 Plan Year Unlocked:

Updates [Help](#)

Compliance Menu

- Census
  - Tasks
  - Transactions
  - Miscellaneous
  - Tools/Settings
  - Plan Specifications

Select Grids

Participant Lookup	None	
Service Grid	None	
Initial Eligibility Grid	None	
Continuing Eligibility Grid	None	
HCE Grid	None	
Key Grid	None	
Allocation Grid	None	
410(b) Grid	None	
ADP/ACP Grid	None	
General Test Grid	None	
UD Grid 1	* ftw First Year Supplemental Census Grid (a79ad3f)	<a href="#">Edit Data</a>   Download:     Upload:
UD Grid 2	* ftw Self Employment Calculations (3ed4c3f)	<a href="#">Edit Data</a>   Download:     Upload:
UD Grid 3	None	
UD Grid 4	None	
UD Grid 5	None	

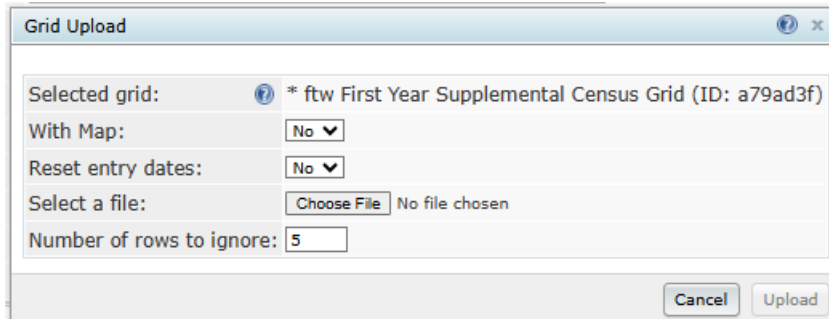
Save Selections

Most plans will need other information entered into the system beyond the census data, at least in the first plan year. For example, if you are running the Top Heavy test you will need to add information about prior year in-service distributions using a supplemental grid in the Other Import/Export/Reports menu. There are several \* ftw grids that we suggest you use to view or edit supplemental data. You can import or directly enter data that does not appear in your census. You should first upload a census for the plan year, then enter other information under the Other Import/Export/Reports menu prior to running the Scrub/Eligibility task.

**Note:** "Upload" will not be an option if the selected grid does not have SSN or employee ID information and you will instead see "N/A - no SSN" where "Upload" would normally appear. If you have a data grid that you would like to use for upload and need to add a SSN or employee ID field, you can edit the grid by going to Census>Create/Edit. See [Edit Data Entry Grids](#) for more info on editing census grids.

If you wish to add additional historical data to your census, a useful grid to add for a first year plan is “\*ftw First Year Supplemental Census Grid”. This grid allows you to enter supplemental data for prior years of service and in-service distribution amounts for Top Heavy testing.

When uploading a grid in the Other Import/Export/Reports menu, there is a "With Map" option. This option allows you to direct the software to use the mapping on the census you are uploading instead of the data and [mapping](#) that was included on the grid currently in the Census screen. If No is selected, the system will use the data fields uploaded with no mapping. Selecting Yes will direct the software to use the mapping from the file that you are uploading instead of the grid on the Census screen. Using the \*ftw Supplemental Census Grids as an example since it is often used, these additional grids are not setup for mapping of compensation and hours as the software is built around the concept of the compensation and hours mapping occurring from the census grid that is selected on the Census screen. **Unless directed otherwise by our support team, leave "With Map" set to No because the mapping should be based on the census grid that you have in place on the Census screen.**



The screenshot shows a "Grid Upload" dialog box with the following fields and options:

- Selected grid:** \*ftw First Year Supplemental Census Grid (ID: a79ad3f)
- With Map:** No (dropdown menu)
- Reset entry dates:** No (dropdown menu)
- Select a file:** Choose File (button) No file chosen (text)
- Number of rows to ignore:** 5 (text input)
- Buttons:** Cancel, Upload

## User-Defined Reports

The UD Grid spaces on the Other Import/Export/Report menu allow you to select User Defined Reports to generate in Word or Excel format. UD Grid fields 1-5 are able to be included in the selected reports for the [Client Package](#). If you want to include a custom report, you would first need to [create the custom grid](#).

Several sample grids are supplied with the Compliance software. The grid names being with \*ftw and cannot be edited, but you can use the Copy function to create a copy of that grid and customize as needed. All grids for your company code's log-in (and division, if applicable) will be available for selection. After selecting a grid from the drop-down, click on "Save Selections" to add the grid to the UD Grid field.

**NOTE:** We strongly suggest that you make a copy of any grid you wish to change (select the grid, click "Copy" and give the new grid a custom name) because changes made to grids are global and will effect any plan using the grid in any existing plan years.

[Appendix I](#) contains suggestions for supplemental grids that are available for extracting additional data on the Other Import/Exports/Reports menu.

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