

9.3.1. Global

10/05/2026 8:35 pm CDT

You can design your own styles and save them as options for future selection for individual plans, modify the default client letter and add custom language in global settings.

The screenshot shows the 'Global Printing Parameters' screen in the Wolters Kluwer system. The top navigation bar includes the Wolters Kluwer logo, a 'Select a Plan...' dropdown, a 'Go' button, and a 'User Name' dropdown. The breadcrumb trail is: Home > Edit Company > Edit Plan > Compliance > Select Printing Parameters > Global Printing Parameters. The main content area is divided into several sections: 1. 'Company: Test Company ID:' and 'Plan: Demo Plan ID:' fields, with 'Year End: 12/31/2026' and 'Plan Year Unlocked: [lock icon]'. 2. 'Default Client Prepared By' section with a text area and an 'Update' button. 3. 'Default Client Letter' section with a large text area and an 'Update' button. 4. 'Edit/Create Custom Styles' section with a dropdown menu showing 'Rw Cover Letter' and buttons for 'Edit', 'Copy', and 'Delete'. 5. 'Global Report Options' section with a 'Client Package' dropdown and an 'Edit' button. 6. 'Global SSN Masking' section with a 'Show full SSNs in Compliance reports: No' dropdown and an 'Update' button, followed by a note: 'NOTE: This setting does not affect reports which have their own, individual SSN Masking setting.' 7. 'Global Client Packages' section with a note: 'NOTE: Packages will be available on the plan level but will not override the plan level print package.' and a 'Select Package:' dropdown with 'Add New' and 'Delete' buttons. On the right side, there is a 'Compliance Menu' with links to 'Census', 'Tasks', 'Transactions', 'Miscellaneous', 'Tools/Settings', and 'Plan Specifications'. A vertical scrollbar is visible on the right side of the main content area. The left sidebar has a 'Census' button, and the right sidebar has a 'Transactions' button.

Set Default Client Letter

Click on the “Global Printing Parameters” link on the “Select Printing Parameters” screen (or from “Tools/Settings” in the Compliance Menu, clicking the “Global” option under “Print Setting”). Here text for a default global letter can be added and will be available for use with all your clients. Type or paste the text for the letter in the lower block of the “Default Client Letter” section, then click “Update”. This letter can be the default for all your clients so you will just need to customize it for the client and package you are sending.

The screenshot displays the 'Global Printing Parameters' page in the Wolters Kluwer system. At the top, there's a navigation bar with 'Wolters Kluwer' and a 'Select a Plan...' dropdown. Below this, a breadcrumb trail reads: Home > Edit Company > Edit Plan > Compliance > Select Printing Parameters > Global Printing Parameters. The main content area is divided into several sections:

- Company/Plan Info:** Shows 'Company: Test Company', 'Plan: Demo Plan', 'Year End: 12/31/2026', and 'Plan Year Unlocked: [lock icon]'.
- Default Client Prepared By:** A text input field with an 'Update' button.
- Default Client Letter:** A large text area for the 'Default Cover Letter' with an 'Update' button.
- Edit/Create Custom Styles:** A section with a dropdown menu currently showing '*ftw Cover Letter' and buttons for 'Edit', 'Copy', and 'Delete'.
- Global Report Options:** A dropdown for 'Client Package' with an 'Edit' button.
- Global SSN Masking:** A section with a 'Show full SSNs in Compliance reports:' dropdown set to 'No' and an 'Update' button. A note states: 'NOTE: This setting does not affect reports which have their own, individual SSN Masking setting.'
- Global Client Packages:** A section with a 'Select Package:' dropdown, 'Add New', and 'Delete' buttons. A note states: 'NOTE: Packages will be available on the plan level but will not override the plan level print package.'

 On the right side, there's a 'Compliance Menu' with links to 'Census', 'Tasks', 'Transactions', 'Miscellaneous', 'Tools/Settings', and 'Plan Specifications'. A vertical sidebar on the far right contains 'Census' and 'Transactions' buttons.

Edit/Create Custom Styles

Click on “Global Printing Parameters” at the top of the “Set Printing Parameters” page or select the “Global” print setting option from the Compliance Menu under “Tools/Settings”. The first box on the “Global Printing Parameters” screen is where you can edit/design one or more custom styles for your client letter and reports. The style options include using one of the default styles already set up, or adding your own custom style. You’ll see the following options in the drop-down box on this screen:

- *ftw Cover Letter
- *ftw Plain
- *ftw Intermediate
- *ftw Elaborate

To create your own custom client letter style, select “*ftw Cover Letter” in the drop-down box on the “Edit/Create Custom Styles” box and click “Copy”.

Custom Cover Letter Styles

You will see the “Custom Styles” screen shown below. You should edit the description field to indicate who owns it (e.g. call it “John’s Cover Letter”), then you can change the font type, margins and font size to reflect your own preferences. After you click “Return” this new style will be available to select for all your client letters. Please note that you cannot edit a default style; you need to copy it and then you can edit the copy.

The screenshot shows a 'Custom Styles' dialog box with the following fields:

- Description: Copied from: * ftw Cover Letter
- Overall Options:
 - Font Type: Calibri
 - Page Margin Left: .5
 - Page Margin Right: .5
 - Page Margin Top: 1.0
 - Page Margin Bottom: .5
 - Font Size: 11
- Buttons: Close, Update

Custom Report Styles

You can also set a default style for your reports and statements from the same screen as the default letter style (the “Edit/Create Custom Styles” page). There are four default styles set up already - “*ftw Plain”, “*ftw Intermediate”, “*ftw Elaborate Blue” and “*ftw Elaborate”. Again, these are not editable, but you can either use one of them as is, or you can copy and edit one or more of them to create your own custom styles. To do this, select one of the four default styles from the drop-down box and select “Copy”. You can change the description to reflect who created it and what style it was copied from. You can also select the font type, color and size for the different sections of the reports as well as margin width. To the right is the top of the screen that you’ll see when you select a style and elect to copy (or, if it has already been copied, edit it):

The screenshot shows a 'Custom Styles' dialog box with the following fields:

- Description: Copied from: * ftw Elaborate
- Overall Options:
 - Font Type: Calibri
 - Page Margin Left: .4
 - Page Margin Right: .4
 - Page Margin Top: .4
 - Page Margin Bottom: .4
 - Fit To Page: Yes
 - Center Page: Yes
- Title Options: (Section header, no fields visible)

Custom Report Styles - Statement Options

As well as selecting a print style for your statements as described above, you can include plan specific messages on the statements and also display the investment related [notice language](#) required by the 2006 Pension Protection Act (PPA) for certain plans. Plans are required to provide the statement if the plan is an individual account plan (other than a one-participant plan) and allows participants/beneficiaries to direct the investment of assets in his or her account under the plan.

You may now use the Custom PPA Message /Message 3 when Include Default PPA Information is "No". This is valuable when PPA is not needed and you have a larger communication to be included in the statements.

See the screen shot below - this is the statement section of the “Edit Print Styles” screen and is available for both statement formats, the Individual Participant Statement and the Custom Participant Statement.

Custom Styles

Statement Options

Only Font Type and The Following Apply to Custom Statements

Message 1	Message 1 goes on and on and on beca
Message 2 (limited availability)	Message 2 also goes on and on and on
Custom PPA / Message 3	Message 3 is custom PPA and also goes
Include Default PPA Information	Yes ▼

Close Update

There's more information about the difference between the two formats below.

The text you enter in the "Message 1" box shown above will be printed at the top right of the first page of the statement. Please note that the "Message 2" box is only available for the Custom Participant Statement (hence the note about limited availability) and prints in the section "Your Account at a Glance".

You can select whether to add the PPA investment language by setting "Include PPA Information" to "Yes". If you opt to include it, the text that will be printed on the statements is as follows:

"To help achieve long-term retirement security, you should give careful consideration to the benefits of a well-balanced and diversified investment portfolio. Spreading your assets among different types of investments can help you achieve a favorable rate of return, while minimizing your overall risk of losing money. This is because market or other economic conditions that cause one category of assets, or one particular security, to perform very well often cause another asset category, or another particular security, to perform poorly. If you invest more than 20% of your retirement savings in any one company or industry, your savings may not be properly diversified. Although diversification is not a guarantee against loss, it is an effective strategy to help you manage investment risk.

In deciding how to invest your retirement savings, you should take into account all of your assets, including any retirement savings outside of the Plan. No single approach is right for everyone because, among other factors, individuals have different financial goals, different time horizons for meeting their goals, and different tolerances for risk.

It is also important to periodically review your investment portfolio, your investment objectives, and the investment options under the Plan to help ensure that your retirement savings will meet your retirement goals.

Department of Labor information. For more information regarding individual investing and diversification, see the internet website of the U.S. Department of Labor at: www.dol.gov/ebsa/investing.html"

There is also an option to add your own custom PPA related message, which will appear above the standard PPA language on the statement. You enter this in the "Custom PPA Information" box.

Global Report Options

From within Global Printing Parameters, users can customize a variety of options for each of the available reports. The ability to customize reports is located under the "Global Report Options" box. To select a report to edit, press the drop down arrow next to the edit button, select the applicable report and press the edit button. Checking the box next to an option will include the option in the specific report for all plans. Leaving a box blank (or removing the check mark from the box) will exclude the option for that specific report for all plans. When done making selections, press "Save & Close". Below will describe the individual reports and options available for those reports.

The Client Package has the option to individually include or exclude the Client Letter, Cover Page, Table of Contents, Page Numbers, and Hide Warnings. This means that the options selected here will be the options seen when the Client Package is printed for every plan.

Eligibility Status Report can be sorted by name, status, compensation, or hours, in either ascending or descending order. Additionally, certain information can be included or excluded from the Eligibility Status Report. This information includes, participant SSNs (masked or full), compensation, deferrals, Roth, and the columns that display whether initial or continuing eligibility has been overridden. Dollar signs can also be included or excluded from the report, as well as Attained Age, Vesting Years of Service and users have the options to choose one row per participant (CSV only) and/or exclude Control Totals. The options selected here will display or not be displayed in the Eligibility Status Report for every plan.

Global Report Settings: Eligibility Status

Sorting

Field:

Order: ☒ Ascending / ☐ Descending

Optional Information

☐ SSN (apply mask ☐) ☐ Compensation
☐ Deferrals ☐ Roth
☐ Show Dollar Sign ☐ Attained Age
☐ Vesting Years of Service ☐ One Row Per Ppt (CSV only)
☐ Excl Control Totals

Optional Columns

☒ Initial Override ☒ Continuing Override

Save & Close Cancel

Allocation Report can be sorted by name or status, in either ascending or descending order. Additionally, certain information can be included or excluded from the Allocation Report. This information includes participant SSNs (masked or full), HCE status, Birth Date, Hire Date, Term Date, division and status, as well as include Eligibility identifier, % symbols, and Employer contribution total. Dollar signs, Compensation by source, and only participants with contributions can also be included or excluded from the report, and users have the option to combine Pre-tax and Roth into one value. The options selected here will display or not be displayed in the Allocation Report for every plan.

Global Report Settings: Allocation Report

***Report Disclaimer**

Sorting

Field:

Order: ☒ Ascending / ☐ Descending

Optional Information

☒ Show Dollar Sign ☒ Comp by Source
☐ Only Ppt W/Contributions ☒ Combine Pre-Tax/Roth

Optional Columns

☒ SSN (apply mask ☐) ☐ HCE Status
☐ Birth Date ☐ Hire Date
☐ Term Date ☐ Status
☐ Division ☒ Include Elig
☐ Include % ☐ ER Total

Save & Close Cancel

Transaction Reports and Statements can also be customized. Every transaction report/statement option that can be edited has its own global report setting. This means that different options can be selected for different statements/reports. Below, for example, are the options available for "Statements - Custom Individual Participant". The options here can be set differently than those set for "Statements - Individual Participant" or other statement options. Options available for statements include sorting by name and status, including or excluding employee SSNs or employee number (as defined in Plan Specifications --> General Features), dollar signs, hours of service, and fees. Including fees will carve out the fees from the earnings or gain/loss column and display them in a separate fees column.

Global Report Settings: Statements - Custom Individual Participant x

Sorting

Field: Status ▼

Order: ☒ Ascending / ☐ Descending

Optional Information

☒ EE# / SSN (apply mask ☒) ☐ Show Dollar Sign

☐ Hours of Service

Optional Columns

☐ Fees

Save & Close Cancel

The ADP/ACP Test Detail Report can be sorted by name (alphabetically), compensation or status. Users can choose to have dollar signs appear and to include or exclude employee SSN (masked or full) or employee number (as selected in Plan Specifications --> General Features), division and status columns.

Global Report Settings: ADP ACP Test x

Sorting

Field: Compensation ▼

Order: ☒ Ascending / ☐ Descending

Optional Information

☒ Show Dollar Sign

Optional Columns

☒ EE# / SSN (apply mask ☒) ☒ Division ☐ Status

Save & Close Cancel

The ADP/ACP Test Corrections Report can be sorted by name (alphabetically), compensation or status. Users can choose to have dollar signs appear and to include or exclude employee SSN (masked or full) or employee number (as selected in Plan Specifications --> General Features), 402(g) catchup and status columns.

Global Report Settings: ADP ACP Corrections x

Sorting

Field: Compensation ▼

Order: ☒ Ascending / ☐ Descending

Optional Information

☒ Show Dollar Sign

Optional Columns

☒ EE# / SSN (apply mask ☒) ☐ Status

☒ 402g Catchup

Save & Close Cancel

The Estimated QNEC report can be sorted by name (alphabetically), compensation or status. Users can choose to have dollar signs appear and to include or exclude employee SSN (masked or full) or employee number (as selected in Plan Specifications --> General Features), division and status columns.

Global Report Settings: Estimate QNEC

Sorting

Field: Compensation

Order: ☒ Ascending / ☐ Descending

Optional Information

☒ Show Dollar Sign

Optional Columns

☒ SSN (apply mask ☐) ☐ Division

☐ Status

Save & Close

Cancel

Global Default Parameters

The Global Print Settings feature allows organizations to establish company-wide default print styles and page orientations for all reports, statements, grids, and user-defined grids within the DC Compliance module. Once configured, these defaults can be applied across plans while still allowing plan-specific exceptions when needed.

Click [here](#) for a training tutorial video, and below for more details!

Wolters Kluwer

Select a Plan...

Go

Gerri Hill

Home > Edit Company > Edit Plan > Compliance > Select Printing Parameters > Global Printing Parameters

Update Help

Global Default Parameters Help

Global Cover Letter Print Parameters (Default Values)

Report	Style	Orientation	Apply to All Plans
Cover Letter	* ftw Cover Letter	Portrait	Apply to all plans

Global Default Print Parameters (Default Values)

Set Defaults for All Reports	Style	Orientation	
All Reports	* ftw Elaborate	Portrait	Update Company Code Default Settings

Global Report Print Parameters (Default Values)

Replace All Report Settings All Plans

[Plan Report Settings](#)

Report	Style	Orientation	Apply to All Plans
Scrub/Eligibility			
Eligibility Status	* ftw Elaborate Blue	Portrait	Apply to all plans
HCE Key Determination	* ftw Elaborate Blue	Portrait	Apply to all plans
Key Determination for Next Year	* ftw Elaborate Blue	Portrait	Apply to all plans
402(g) Limit Test	* ftw Intermediate	Portrait	Apply to all plans
HCE Next Year (TPG)	* ftw Plain	Landscape	Apply to all plans
HPI Next Year	* ftw Intermediate	Portrait	Apply to all plans
Allocation			
Allocation Report	* ftw Elaborate Blue	Portrait	Apply to all plans
True-Up Report	* ftw Elaborate Blue	Portrait	Apply to all plans
Integrated Report	* ftw Elaborate Blue	Portrait	Apply to all plans
Top Heavy Minimum Allocation	* ftw Intermediate	Portrait	Apply to all plans
Combined Test			
410(b) Ratio Percentage Test	* ftw Elaborate Blue	Portrait	Apply to all plans
410(b) Average Benefit Test	* ftw Elaborate Blue	Portrait	Apply to all plans
Annual Additions Report	* ftw Elaborate Blue	Portrait	Apply to all plans
Deduction Test	* ftw Elaborate Blue	Portrait	Apply to all plans
Compensation Test	* ftw Elaborate Blue	Portrait	Apply to all plans
ADP/ACP			
ADP ACP Test	* ftw Elaborate Blue	Portrait	Apply to all plans
ADP ACP Corrections	* ftw Elaborate Blue	Portrait	Apply to all plans
Enhanced ADP ACP Corrections	* ftw Elaborate Blue	Portrait	Apply to all plans
Estimate QNEC	* ftw Elaborate Blue	Portrait	Apply to all plans
Disproportionate QNEC	* ftw Elaborate Blue	Portrait	Apply to all plans
Testing/Demographic Analysis Report	* ftw Elaborate Blue	Portrait	Apply to all plans
General Test			
Gateway Report	* ftw Elaborate	Portrait	Apply to all plans

Rate Group Report	* ftw Elaborate Blue	Portrait	Apply to all plans
Gen Test Average Benefits	* ftw Elaborate Blue	Portrait	Apply to all plans
Top Heavy			
Top Heavy Report	* ftw Elaborate Blue	Portrait	Apply to all plans
RMD/RBD			
RMD Notice	* ftw Intermediate	Portrait	Apply to all plans
Miscellaneous			
Catchup and Excess	* ftw Intermediate	Portrait	Apply to all plans
Summary of Test Results	* ftw Elaborate Blue	Portrait	Apply to all plans
Plan Highlights	* ftw Elaborate Blue	Portrait	Apply to all plans

Global Statement Print Parameters (Default Values)			
Report	Style	Orientation	Apply to All Plans
Statements - Individual Participant	* ftw Elaborate Blue	Portrait	Apply to all plans
Statements - Custom Individual Participant	* ftw Elaborate Blue	Portrait	Apply to all plans
Detail - Participant Account Report	* ftw Elaborate Blue	Portrait	Apply to all plans
Detail - Participant Account Report w/Dates	* ftw Elaborate Blue	Portrait	Apply to all plans
Summary - Participant Accounts	* ftw Elaborate Blue	Portrait	Apply to all plans
Totals - Participant Accounts	* ftw Elaborate Blue	Portrait	Apply to all plans
Distribution Report	* ftw Elaborate Blue	Portrait	Apply to all plans
Distribution Report - Term w/ Balance	* ftw Elaborate	Portrait	Apply to all plans

Global Grids Print Parameters (Default Values)			
Grid	Style	Orientation	Apply to All Plans
Participant Lookup Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
Service Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
Initial Eligibility Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
Continuing Eligibility Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
HCE Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
Key Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
Allocation Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
410(b) Ratio Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
410(b) Average Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
ADP/ACP Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
General Test Grid	* ftw Elaborate Blue	Portrait	Apply to all plans
UD Grid 1	* ftw Elaborate Blue	Portrait	Apply to all plans
UD Grid 2	* ftw Elaborate Blue	Portrait	Apply to all plans
UD Grid 3	* ftw Elaborate Blue	Portrait	Apply to all plans
UD Grid 4	* ftw Elaborate Blue	Portrait	Apply to all plans
UD Grid 5	* ftw Elaborate Blue	Portrait	Apply to all plans

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Before You Begin - Important Considerations

Global Print Settings include safeguards because changes can affect all plans within a company code.

Recommendations:

- Limit edit permissions to a small group of experienced administrators.
- Review existing plan-level settings before making global changes.
- Carefully read all confirmation messages before proceeding.

Note: Actions performed through Global Print Settings cannot be undone.

Enabling Global Print Settings

Only a **Master User** can enable Global Print Settings for a company code.

From the Wolters Kluwer logo menu,

1. Navigate to Administrative Tasks.
2. Select Account Profile.
3. Scroll to the DC Global Print Settings section.
4. Select the DC Global Print Settings checkbox.
5. Click Update.

DC Global Print Settings

Enable DC Global Print Settings for Company Code: ☒

Update

Once enabled, authorized users will be able to view the default print style and default page orientations on the Global Print Settings page for all reports, statements, and grids in the system.

Assigning User Permissions

After the feature is enabled, administrators can determine which users can access the functionality.

From the Wolters Kluwer logo menu,

1. Navigate to **Administrative Tasks**.
 2. Select **Users**.
 3. Open the desired user record.
 4. Locate the **DC Global Print Settings** permission.
 5. Select the appropriate permission level.
 - None: User cannot view Global Print Settings.
 - Edit: User can view and modify Global Print Settings.
- Save the user record.

Best Practice: Restrict Edit permissions to a limited number of administrative users.

Permissions

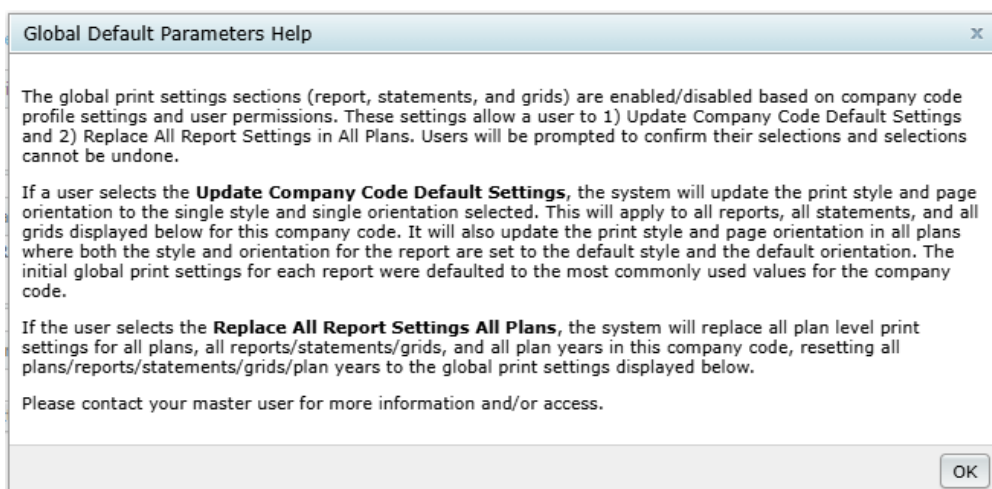
Designated Admin	No ▼
May Delete	No ▼
May Add	No ▼
Can Edit Plan IDs	▼
DC Custom Report Editor	None ▼
Can Edit PDS Templates	No ▼
Can Use Secure Upload	No ▼
DC Global Print Settings	Edit ▼

None
Edit

Global Default Parameters Help

This link is available regardless of whether the user has access to the settings grid and provides the following information in a pop-up window, when clicked.

- Setup information
- Permission requirements
- Descriptions of available actions
- Confirmation message explanations
- Details regarding the impact of changes



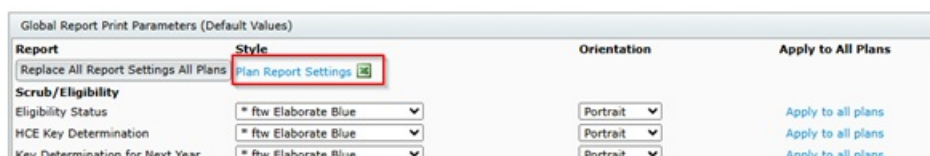
Understanding Initial Global Default Values

For **Existing Company Codes**, an initial set of default values were designated based on the most used Print Style and Page Orientation for each report for each company code.

For **New Company Codes**, the Default Print Style will be set to “*ftw Intermediate”, and the Default page Orientation will be set to “Portrait” for all reports, statements, and grids.

Plan Report Settings File

Before making changes, administrators may want to review which plan level reports differ from company code defaults.

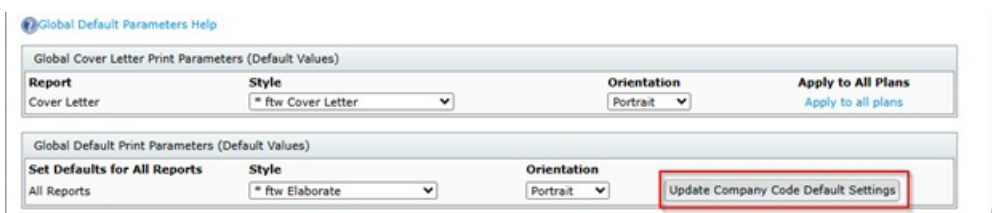


Select the link to download the file which identifies reports by Plan / Plan Year / Report, where either the Print Style or Page Orientation do not match the company defaults.

This report can help determine the potential impact of global updates.

Updating Company Code Default Settings

Use this option when you want to establish a new company-code baseline for all reports, statements, and grids, where all will have the same Style and Orientation as the single set of values selected are applied to all the reports, statements, and grids listed below.



1. Select the desired Print Style.
2. Select the desired Page Orientation.
3. Click **Update Company Code Default Settings**.

4. Review the confirmation message.
5. Select **Yes** to proceed.

What Happens?

The system:

- Updates the company-code default settings for all reports, statements, and grids listed below.
- Updates reports in plans where both the Print Style and Page Orientation currently match the existing defaults, e.g. system default values, most used designated values mentioned above.
- Leaves reports in plans with customized settings unchanged.

Replace All Plan-Level Settings

Use this option when you want all plans and plan years to match the selected global settings for all reports, statements, and grids.

Report	Style	Orientation	Apply to All Plans
Replace All Report Settings All Plans	Plan Report Settings		
Scrub/Eligibility			
Eligibility Status	* ftw Elaborate Blue	Portrait	Apply to all plans
HCE Key Determination	* ftw Elaborate Blue	Portrait	Apply to all plans

1. Configure the desired global Print Style and Page Orientation for each report.
2. Click **Replace All Report Settings All Plans**.
3. Review the confirmation message.
4. Select **Yes**.

What Happens?

The system replaces plan-level settings for:

- All plans
- All plan years
- All reports
- All statements
- All grids

with the Global Print Settings currently displayed.

Warning: This action cannot be undone.

Updating Individual Reports and Apply to All Plans

Settings can also be modified at the report level.

You may:

- Change a specific report's Print Style.
- Change a specific report's Page Orientation.
- Apply those changes to all plans.

This option provides flexibility when only certain reports require standardization.

