

9.3.2. Plan Level

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In the "Select Printing Parameters" screen are options to add a default cover letter, select a printing style and orientation for this cover letter and each of the reports.

The screenshot displays the 'Select a Plan...' interface in the Wolters Kluwer system. The top navigation bar includes the company name 'Wolters Kluwer', a search bar with 'Select a Plan...', and user information 'Geri Hill'. The main content area is titled 'Select Printing Parameters' and shows the following details:

- Company:** Test Company
- Plan:** Demo Plan
- Year End:** 12/31/2026
- Plan Year Unlocked:** (indicated by a green lock icon)

The interface is divided into three main sections for configuring printing parameters:

- Global Printing Parameters:**
 - Cover Letter (Plan Values):** A table with columns for Cover Letter, Style, Orientation, and Default. The 'Cover Letter' row shows 'ftw Cover Letter' as the style, 'Portrait' as the orientation, and 'Yes' as the default.
 - Default Print Parameters (Plan Values):** A section for setting defaults for all reports. It includes a 'Set Defaults for All reports' button, a 'Style' dropdown (currently 'ftw Elaborate'), an 'Orientation' dropdown (currently 'Portrait'), and buttons for 'Change All Reports' and 'Restore All Reports to Default Values'.
- Report Print Parameters (Plan Values):** A table for configuring individual reports. The table has columns for Report, Style, Orientation, and Default. The reports listed are: Eligibility Status, HCE Key Determination, Key Determination for Next Year, 402(g) Limit Test, HCE Next Year (TPG), HPI Next Year, and Allocation. Each report has a corresponding style dropdown (e.g., 'ftw Elaborate Blue', 'ftw Intermediate', 'ftw Plain') and an orientation dropdown (e.g., 'Portrait', 'Landscape').

On the right side of the screen, there is a 'Compliance Menu' with links to 'Census', 'Tasks', 'Transactions', 'Miscellaneous', 'Tools/Settings', and 'Plan Specifications'. The left sidebar shows a 'Census' button, and the right sidebar shows a 'Transactions' button.

Having designed custom styles for the client letter and reports, the next step is to select a style or styles to use and their orientation. The custom styles previously created will display as options in the drop-down box within the "Select Printing Parameters" screen. On this screen you can select a print style for your client letter, and for each of your reports and statements. You can either select one style for all reports and statements or you can select the styles individually for each report and each statement type. See the screen shot below - the box in the middle allows you to select a single style for all reports and statements whereas the box below is where you make the individual selections for reports. A further option is the orientation for the report - whether you prefer Portrait or Landscape. Additionally, you have the option to also "Restore All Reports to Default Values" set at the company code level.

Wolters Kluwer Select a Plan... Go Geri Hill

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

Company: Test Company ID:
 Plan: Demo Plan ID:
 Year End: 12/31/2026 Plan Year Unlocked:

Global Printing Parameters

Cover Letter (Plan Values)

	Style	Orientation	Default
Cover Letter	* ftw Cover Letter	Portrait	Yes

Default Print Parameters (Plan Values)

Set Defaults for All reports

	Style	Orientation
All Reports	* ftw Elaborate	Portrait
Change All Reports		
Restore All Reports to Default Values		

Report Print Parameters (Plan Values)

Report	Style	Orientation	Default
Scrub/Eligibility			
Eligibility Status	* ftw Elaborate Blue	Portrait	Yes
HCE Key Determination	* ftw Elaborate Blue	Portrait	Yes
Key Determination for Next Year	* ftw Elaborate Blue	Portrait	Yes
402(g) Limit Test	* ftw Intermediate	Portrait	Yes
HCE Next Year (TPG)	* ftw Plain	Landscape	Yes
HPI Next Year	* ftw Intermediate	Portrait	Yes
Allocation			

Compliance Menu

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

Census Transactions

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

If you opt to make individual style selections for statements, you do this directly below where you select report styles. You can also do the same for grids.

Wolters Kluwer Select a Plan... Go Geri Hill

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

HP1 Next Year

	Style	Orientation	Default
HP1 Next Year	* ftw Intermediate	Portrait	Yes

Allocation

	Style	Orientation	Default
Allocation Report	* ftw Elaborate Blue	Portrait	Yes
True-Up Report	* ftw Elaborate Blue	Portrait	Yes
Integrated Report	* ftw Elaborate Blue	Portrait	Yes
Top Heavy Minimum Allocation	* ftw Intermediate	Portrait	Yes

Combined Test

	Style	Orientation	Default
410(b) Ratio Percentage Test	* ftw Elaborate Blue	Portrait	Yes
410(b) Average Benefit Test	* ftw Elaborate Blue	Portrait	Yes
Annual Additions Report	* ftw Elaborate Blue	Portrait	Yes
Deduction Test	* ftw Elaborate Blue	Portrait	Yes
Compensation Test	* ftw Elaborate Blue	Portrait	Yes

ADP/ACP

	Style	Orientation	Default
ADP ACP Test	* ftw Elaborate Blue	Portrait	Yes
ADP ACP Corrections	* ftw Elaborate Blue	Portrait	Yes
Enhanced ADP ACP Corrections	* ftw Elaborate Blue	Portrait	Yes
Estimate QNEC	* ftw Elaborate Blue	Portrait	Yes
Disproportionate QNEC	* ftw Elaborate Blue	Portrait	Yes
Testing/Demographic Analysis Report	* ftw Elaborate Blue	Portrait	Yes

General Test

	Style	Orientation	Default
Gateway Report	* ftw Elaborate	Portrait	Yes
Rate Group Report	* ftw Elaborate Blue	Portrait	Yes
Gen Test Average Benefits	* ftw Elaborate Blue	Portrait	Yes

Top Heavy

	Style	Orientation	Default
Top Heavy Report	* ftw Elaborate Blue	Portrait	Yes

RMD/RBD

	Style	Orientation	Default
RMD Notice	* ftw Intermediate	Portrait	Yes

Miscellaneous

	Style	Orientation	Default
Catchup and Excess	* ftw Intermediate	Portrait	Yes
Summary of Test Results	* ftw Elaborate Blue	Portrait	Yes
Plan Highlights	* ftw Elaborate Blue	Portrait	Yes

Statement Print Parameters (Plan Values)

Report	Style	Orientation	Default
Statements - Individual Participant	* ftw Elaborate Blue	Portrait	Yes
Statements - Custom Individual Participant	* ftw Elaborate Blue	Portrait	Yes
Detail - Participant Account Report	* ftw Elaborate Blue	Portrait	Yes
Detail - Participant Account Report w/Dates	* ftw Elaborate Blue	Portrait	Yes
Summary - Participant Accounts	* ftw Elaborate Blue	Portrait	Yes
Totals - Participant Accounts	* ftw Elaborate Blue	Portrait	Yes
Distribution Report	* ftw Elaborate Blue	Portrait	Yes
Distribution Report - Term w/ Balance	* ftw Elaborate	Portrait	Yes

Census Transactions

Grids Print Parameters (Plan Values)			
Grid	Style	Orientation	Default
Participant Lookup Grid	* ftw Elaborate Blue	Portrait	Yes
Service Grid	* ftw Elaborate Blue	Portrait	Yes
Initial Eligibility Grid	* ftw Elaborate Blue	Portrait	Yes
Continuing Eligibility Grid	* ftw Elaborate Blue	Portrait	Yes
HCE Grid	* ftw Elaborate Blue	Portrait	Yes
Key Grid	* ftw Elaborate Blue	Portrait	Yes
Allocation Grid	* ftw Elaborate Blue	Portrait	Yes
410(b) Ratio Grid	* ftw Elaborate Blue	Portrait	Yes
410(b) Average Grid	* ftw Elaborate Blue	Portrait	Yes
ADP/ACP Grid	* ftw Elaborate Blue	Portrait	Yes
General Test Grid	* ftw Elaborate Blue	Portrait	Yes

Understanding the Default Indicator

A Default column indicates whether a report matches company defaults.

- Yes: Both the report's Print Style and Page Orientation match the company-code defaults.
- No: Either the report's Print Style or Page Orientation differs from the company-code defaults.

Wolters Kluwer

Select a Plan... Go Geri Hill

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

Print: LENDING PLAN 10...

Year End: 12/31/2026 Plan Year Unlocked:

Global Printing Parameters

Cover Letter (Plan Values)

	Style	Orientation	Default
Cover Letter	* ftw Cover Letter	Portrait	Yes

Default Print Parameters (Plan Values)

Set Defaults for All reports

	Style	Orientation
All Reports	* ftw Elaborate	Portrait

Change All Reports

Restore All Reports to Default Values

Report Print Parameters (Plan Values)

Report	Style	Orientation	Default
Scrub/Eligibility			
Eligibility Status	* ftw Plain	Landscape	No
HCE Key Determination	* ftw Elaborate Blue	Portrait	Yes
Key Determination for Next Year	* ftw Elaborate Blue	Portrait	Yes
402(g) Limit Test	* ftw Intermediate	Portrait	Yes
HCE Next Year (TPG)	* ftw Plain	Landscape	Yes
HPI Next Year	* ftw Intermediate	Portrait	Yes
Allocation			
Allocation Report	* ftw Elaborate Blue	Portrait	Yes

Tasks

- Transactions
- Miscellaneous
- Tools/Settings
- Plan Specifications

Census

Transactions

Change All Reports in a Plan Year

To assign one print style and page orientation to every report in a plan year:

1. Select a Print Style.
2. Select a Page Orientation.
3. Click **Change All Reports**.
4. Review the confirmation message.
5. Click **Yes**.

The selected settings will be applied to all reports in the plan year.

Reports that no longer match company defaults will display **Default = No**.

Wolters Kluwer Select a Plan... Go Geri Hill

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

Print: 1/2/2019 Print: 1/2/2019

Year End: 12/31/2026 Plan Year Unlocked: [lock icon]

Global Printing Parameters

Cover Letter (Plan Values)

	Style	Orientation	Default
Cover Letter	* ftw Cover Letter	Portrait	Yes

Default Print Parameters (Plan Values)

Set Defaults for All reports

	Style	Orientation
All Reports	* ftw Elaborate	Portrait

Change All Reports

Restore All Reports to Default Values

Report Print Parameters (Plan Values)

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HCE Key Determination	* ftw Elaborate Blue	Portrait	Yes
Key Determination for Next Year	* ftw Elaborate Blue	Portrait	Yes
402(g) Limit Test	* ftw Intermediate	Portrait	Yes
HCE Next Year (TPG)	* ftw Plain	Landscape	Yes
HPI Next Year	* ftw Intermediate	Portrait	Yes
Allocation			
Allocation Report	* ftw Elaborate Blue	Portrait	Yes
True-Up Report	* ftw Elaborate Blue	Portrait	Yes

Restore an Individual Report to Company Code Defaults

When a report displays **Default = No**, you may restore it to the company code default.

1. Click the **No** link.
2. Review the company default values displayed.
3. Confirm the restoration.

The report will be updated to match the company-code Print Style and Page Orientation.

The Default indicator will change back to **Yes**.

The hover text gives additional details.

Report Print Parameters (Plan Values)

Report	Style	Orientation	Default
Scrub/Eligibility			
Eligibility Status	* ftw Plain	Landscape	No
HCE Key Determination	* ftw Elaborate Blue	Portrait	Yes
Key Determination for Next Year	* ftw Elaborate Blue	Portrait	Yes
402(g) Limit Test	* ftw Intermediate	Portrait	Yes
HCE Next Year (TPG)	* ftw Plain	Landscape	Yes
HPI Next Year	* ftw Intermediate	Portrait	Yes
Allocation			
Allocation Report	* ftw Elaborate Blue	Portrait	Yes

Click to restore the cocode default settings for this report in this plan/plan year.
Default Style: * ftw Elaborate Blue
Default Orientation: Portrait

Restore All Reports to Company Defaults

You can also restore every report in the plan to company code defaults.

1. Click **Restore All Reports to Default Values**.
2. Review the confirmation message.
3. Confirm the action.

The system restores all reports for the plan within the plan year to the company-code default settings.

Note: This action cannot be undone.

Wolters Kluwer Select a Plan... Go Geni Hill

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

Print: 1/2/2019 Print 1/2/

Year End: 12/31/2026 Plan Year Unlocked:

Global Printing Parameters

Cover Letter (Plan Values)

	Style	Orientation	Default
Cover Letter	* ftw Cover Letter	Portrait	Yes

Default Print Parameters (Plan Values)

Set Defaults for All reports

	Style	Orientation
All Reports	* ftw Elaborate	Portrait

Change All Reports

Restore All Reports to Default Values

Report Print Parameters (Plan Values)

Report	Style	Orientation	Default
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HPI Next Year	* ftw Intermediate	Portrait	Yes
Allocation			
Allocation Report	* ftw Elaborate Blue	Portrait	Yes
True-Up Report	* ftw Elaborate Blue	Portrait	Yes

Tasks

- Transactions
- Miscellaneous
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Transactions

How Global and Plan-Level Settings Work Together

A common workflow is:

1. Establish company-code defaults using Global Print Settings.
2. Apply those defaults to all plans.
3. Make plan-specific adjustments only where necessary.

This approach creates consistency while still allowing flexibility for unique plan requirements.