

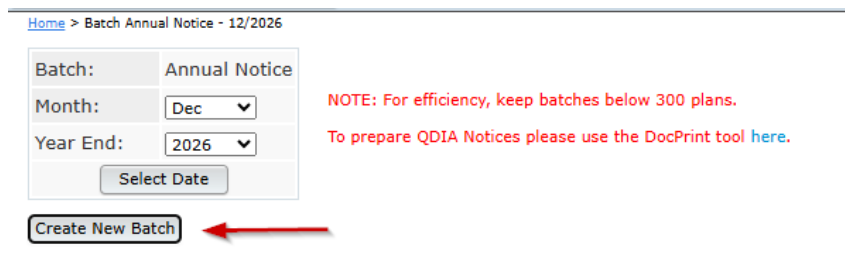
# Creating a Batch

10/01/2025 4:17 pm CDT

To create a batch, first select the Month and year (PYE), then click on the "Select Date" button. For example, for notices effective January 1, 2026, select December for the "Month" and 2026 for the "Year End".



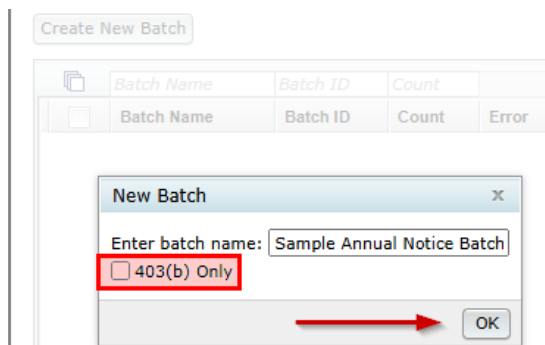
1. To create a batch, click the "Create New Batch" button.




2. Type in a name for the batch and click "Ok".

**PLEASE NOTE:** Separate batches are required for 401(k) plans and 403(b) plans. To prepare notices for 403(b) plans check the box "403(b) Only". You will be able to generate an Annual Notice, Universal Availability Notice and 415 Notice for each 403(b) plan in your batch.

You will be directed to the batch menu where you can add plans to your batch.



To select an existing batch, click on the batch name.

|  |                               |          |
|---|-------------------------------|----------|
| Batch Name  |                               | Batch ID |
| <input type="checkbox"/>  | Batch Name                    | Batch ID |
| <input type="checkbox"/>  | Sample 403b<br>Annual Notice  | 345607   |
| <input type="checkbox"/>  | Sample Annual<br>Notice Batch | 345606   |
| <input type="checkbox"/>  | Sample Batch<br>Test          | 345726   |

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