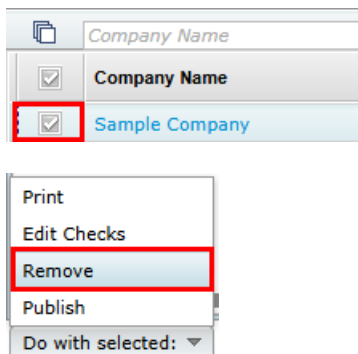


Working Within Your Batch

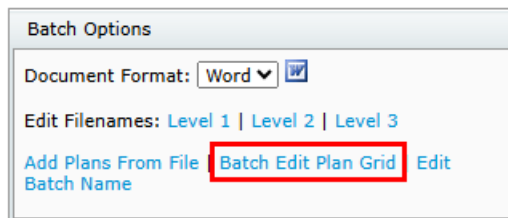
09/26/2025 2:15 pm CDT

Once you have added your plans to your batch, there are several functions available to you.

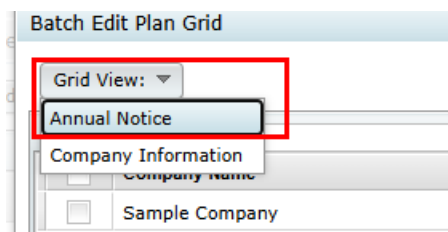
Delete a plan from the list - if you have added a plan by mistake, you can remove the plan from your batch. First, select the plan and then click on the "Do with selected" drop down and choose "Remove".



Edit Plan parameters - if you would like to update certain parameters that affect the Annual Notice, you can do this within your batch. Click on the "Batch Edit Plan Grid" link located under the "Batch Options" menu.



Click on the "Grid View" button and select "Annual Notice" from the drop down. The software will display all the parameters that may be updated from the checklist.



For additional assistance with the grid, you can click on the "Grid Key" in the upper right. This key will provide an explanation of the shading in the grid. For an explanation of the column header and which question is linked to the plan document checklist, you can click on the "Grid Help" link.

Batch Edit Plan Grid						
Grid View: ▼		Currently Showing: Annual Notice				Grid Key Grid Help
	Company Name	Plan Name	PlanID	PlanNumber	PlanYearEnd	N
<input checked="" type="checkbox"/>	Company Name	Plan Name	PlanID	PlanNumber	PlanYearEnd	Nam
<input checked="" type="checkbox"/>	Sample Company	Sample Company 401(k) Plan		001	12-31	▲

You can also update certain parameters by clicking on the "Do with selected" button at the bottom and select "Change columns" from the drop down. You will want to first select the plans that you want to update.

Batch Edit Plan Grid

Grid View: ▼

☒ Company Name

☒ Sample Company












Do with selected: ▼

Show Selected

Change columns

Then select the check box for the parameter that you want to update and then click "Ok" at the bottom of the menu. The software will update all plans selected.


Change Columns - 1 selected Show Selected X

<input type="checkbox"/>	Column	New Value
<input type="checkbox"/>	Name	
<input checked="" type="checkbox"/>	FKModifications	Each pay period 
<input type="checkbox"/>	InvestmentChange	Each pay period
<input type="checkbox"/>	InvestmentChangeOther	Monthly
<input type="checkbox"/>	DeferralElectMethod	Quarterly
<input type="checkbox"/>	DeferralElectMethodDesc	Semi Annual
<input type="checkbox"/>	InvestmentElectMethod	Pursuant to Plan Administrator procedures
<input type="checkbox"/>	InvestmentElectMethodDesc	Paper form 
<input type="checkbox"/>	AutoEnrollDueDate	
<input type="checkbox"/>	AnnNotCustomDate	Yes 
<input type="checkbox"/>	AnnNotCustomDateSpecify	
<input type="checkbox"/>	FKElectionsChange	
<input type="checkbox"/>	SHSECURE	Yes 
<input type="checkbox"/>	ADPACPMaybe	Yes - Include for Prior Year 
<input type="checkbox"/>	MaybeSHMatch	Yes 
<input type="checkbox"/>	InclCOLALimits	Yes 
<input type="checkbox"/>	AnnualNoticeCustom	
<input type="checkbox"/>	QDIA	Yes 
<input type="checkbox"/>	QDIAAnnualNotice	Yes 
<input type="checkbox"/>	EACADefaultInvest	
<input type="checkbox"/>	EACASelfDirect	
<input type="checkbox"/>	QDIAfundinfo	
<input type="checkbox"/>	AltFinancialAdvisor	Yes 
<input type="checkbox"/>	AltFinancialAdvisorID	

OK Cancel

Change batch name - if you would like to change the name of your batch, you can do so by clicking on the "Edit Batch Name" link located under the "Batch Options" menu.

Batch Options

Document Format: Word 

Edit Filenames: [Level 1](#) | [Level 2](#) | [Level 3](#)

[Add Plans From File](#) | [Batch Edit Plan Grid](#) | [Edit](#)

[Batch Name](#)

Type in the new name and click the "Change name" button.

Edit Batch Name✕

Enter new batch name:

Change name

Close
