

Printing Documents


10/07/2025 2:05 pm CDT

Before printing your desired documents, you have the option to customize the file names via the Edit Filenames under the "Batch Options" menu.

- Level 1 applies to the folder that is downloaded from DocPrint. This will contain plan folders and files for all the plans in your batch.
- Level 2 applies to the file or folder within the Zip folder in Level 1.
- Level 3 applies to all the files inside of the folders in Level 2.

Batch Options

Document Format: Word



Edit Filenames:

Level 1

|

Level 2

|

Level 3

Convert Plans

|


Batch Edit Plan Grid

|

Edit Batch Name

To print your desired documents/forms, select your desired format and click on the "Print" checkbox.

Count: 1

Error: 

Complete: ☐


Print: ☐

Publish: ☐

Status:

Batch Options

Document Format: Word



Edit Filenames:

Level 1

|

Level 2

|

Level 3

Convert Plans


|

Batch Edit Plan Grid

|

Edit Batch Name

You can also select plans from your list, then click on the "Do with selected".



Company Name

☒

Company Name

☒

Sample Company

Print

Edit Checks

Remove

Publish

Do with selected: ▼

On the "Print Batch" page, you can choose which documents/forms you want to include. In addition, you can update the "Batch Printed" status, choose your download options via the "Print Options" drop down, include a cover letter, and choose to suppress the error page. Once you have made your selections, click on the "Print" button.

Print Batch: DocPrint Test Batch

Batch Print Status: Mark as Printed

Download Option: ZIP: One Folder, All forms

Cover Letter: N/A [Edit](#)

Suppress Error Page: No

Documents / Forms Select All / Deselect All

Plan Document	Summary Plan Description	Annual Notice
<input type="checkbox"/> Adoption Agreement	<input type="checkbox"/> Summary Plan Description	<input type="checkbox"/> Annual Notice
<input type="checkbox"/> Basic Plan Document	<input type="checkbox"/> Summary Plan Description - English Including Spanish	<input type="checkbox"/> Annual Notice - Spanish
<input type="checkbox"/> Joinder Agreement	<input type="checkbox"/> Foreign Language Requirement	<input type="checkbox"/> Annual Notice - no QDIA
<input type="checkbox"/> Trust Agreement	<input type="checkbox"/> Summary Plan Description - Spanish	<input type="checkbox"/> Annual Notice - no QDIA - Spanish
Required Amendments *	Highlights	<input type="checkbox"/> Annual Notice - QDIA only
<input type="checkbox"/> SECURE/CARES/CAA Amendment	<input type="checkbox"/> Plan Highlights	<input type="checkbox"/> Annual Notice - QDIA only - Spanish
	<input type="checkbox"/> Plan Highlights - Spanish	<input type="checkbox"/> Annual Notice - SIMPLE 401(k)
	Administrative Policies	<input type="checkbox"/> Annual Notice - SIMPLE 401(k) - Spanish
	<input type="checkbox"/> Loan Procedures	Forms
	<input type="checkbox"/> QDRO Procedures	<input type="checkbox"/> Follow-up Notice
	<input type="checkbox"/> Funding Policy	<input type="checkbox"/> Deferral Election Form
	<input type="checkbox"/> SECURE 2.0 Operation Checklist	<input type="checkbox"/> Deferral Election Form - Spanish
	Model/Sample Amendments/Agreements	<input type="checkbox"/> Bonus Deferral Election Form
	<input type="checkbox"/> Consent	<input type="checkbox"/> Self Employed Deferral Election Form
	<input type="checkbox"/> Amendment	<input type="checkbox"/> Publicly-Traded Stock Notice
	<input type="checkbox"/> Short Plan Year Amendment	<input type="checkbox"/> Publicly-Traded Stock Notice - Spanish
	<input type="checkbox"/> Termination Kit non MP	<input type="checkbox"/> Beneficiary Designation
	<input type="checkbox"/> Discretionary Match Sample Kit	<input type="checkbox"/> Beneficiary Designation - Spanish
	<input type="checkbox"/> Safe Harbor Non-Elective Amendment	<input type="checkbox"/> Rollover Contribution
	<input type="checkbox"/> Cease Safe Harbor Amendment	<input type="checkbox"/> Special Tax Notice
	<input type="checkbox"/> Cease Safe Harbor	<input type="checkbox"/> Special Tax Notice - Spanish

Cancel Print

On the "Print Batch" page, there are four options available.

1. "Batch Print Status" - Updates the "Print" date on the Batch Menu. You can choose to update the printed date, leave the printed date unchanged, or choose to mark as not printed.

Print Batch: Sample Batch Test

Batch Printed: Update Print date

Print Options: Update Print date

Cover Letter: Leave Unchanged [Edit](#)

Suppress Error Page: Mark as Not Printed

Documents / Forms Select All / Deselect All

2. "Print Options" - Provides options to choose from on how documents/forms are printed.

- "ZIP: One Folder, All forms" - generates a zip file in a single folder for all plans in the batch.

- "ZIP: One folder per Plan, One file per form" - generates a zip file with individual folders for each plan in your batch.
- "ZIP: One Plan, All forms single file" - generates a zip file containing a single document with all selected documents/forms.

Print Batch: **Sample Batch Test**

Batch Printed: ▼

Print Options: ZIP: One Folder, All forms ▼

Cover Letter: ZIP: One Folder, All forms [Edit](#)

Suppress Error Page: ZIP: One folder per Plan, One file per form

Documents / Forms ZIP: One Plan, All forms single file [Select All](#) / [Deselect All](#)

3. "Cover Letter" - Provides the option of using any of the default cover letters available. You can modify the letter by clicking on the "Edit" link next to the drop-down menu.

Print Batch: **DocPrint Test Batch**

Batch Print Status: ▼

Download Option: ZIP: One Folder, All forms ▼

Cover Letter: N/A ▼ [Edit](#)

Suppress Error Page: N/A

Documents / Forms

Plan Document

☐ Adoption Agreement

☐ Basic Plan Document

☐ Joinder Agreement

☐ Trust Agreement

Required Amendments *

☐ SECURE/CARES/CAA Amendment

Default Annual Notice Email

Default Carryover Increase Amendment cover letter

Default Covid-19 Amendment cover letter

Default Cycle 2 403(b) Restatement Cover Letter

Default Cycle 3 Cash Balance Restatement Cover Letter

Default Cycle 3 Defined Benefit Restatement Cover Letter

Default Document Signer Email

Default POST PPA Restatement cover letter

Default PPA Restatement Email

Default SECURE/CARES/CAA Amendment cover letter

Default Upload Email

Default Welfare Change in Election Amendment Cover Letter

[Deselect All](#)

4. "Suppress Error Page" - gives the option of suppressing the error page. The error page generates as the first page of all documents when the checklist has not passed all edit checks.

Print Batch: **Sample Batch Test**

Batch Printed: ▼

Print Options: ZIP: One Folder, All forms ▼

Cover Letter: N/A ▼ [Edit](#)

Suppress Error Page: No ▼

Documents / Forms No [Select All](#) / [Deselect All](#)

Highlights Yes **Annual Notice**

After making your print selections, choose which supporting materials you would like to include, and click on the "Print"

button at the bottom of the menu.

Print Batch: DocPrint Test Batch

Batch Print Status:Mark as Printed

Download Option:ZIP: One Folder, All forms

Cover Letter:N/AEdit

Suppress Error Page:No

Documents / FormsSelect All / Deselect All

Plan Document

☐ Adoption Agreement

☐ Basic Plan Document

☐ Joinder Agreement

☐ Trust Agreement

Required Amendments *

☐ SECURE/CARES/CAA Amendment

Summary Plan Description

☐ Summary Plan Description

Summary Plan Description - English Including Spanish Foreign Language Requirement

☐ Summary Plan Description - Spanish

Highlights

☐ Plan Highlights

☐ Plan Highlights - Spanish

Administrative Policies

☐ Loan Procedures

☐ QDRO Procedures

☐ Funding Policy

☐ SECURE 2.0 Operation Checklist

Model/Sample Amendments/Agreements

☐ Consent

☐ Amendment

☐ Short Plan Year Amendment

☐ Termination Kit non MP

☐ Discretionary Match Sample Kit

☐ Safe Harbor Non-Elective Amendment

☐ Cease Safe Harbor Amendment

☐ Cease Safe Harbor

Annual Notice

☐ Annual Notice

☐ Annual Notice - Spanish

☐ Annual Notice - no QDIA

☐ Annual Notice - no QDIA - Spanish

☐ Annual Notice - QDIA only

☐ Annual Notice - QDIA only - Spanish

☐ Annual Notice - SIMPLE 401(k)

☐ Annual Notice - SIMPLE 401(k) - Spanish

Forms

☐ Follow-up Notice

☐ Deferral Election Form

☐ Deferral Election Form - Spanish

☐ Bonus Deferral Election Form

☐ Self Employed Deferral Election Form

☐ Publicly-Traded Stock Notice

☐ Publicly-Traded Stock Notice - Spanish

☐ Beneficiary Designation

☐ Beneficiary Designation - Spanish

☐ Rollover Contribution

☐ Special Tax Notice

☐ Special Tax Notice - Spanish

Cancel

Print