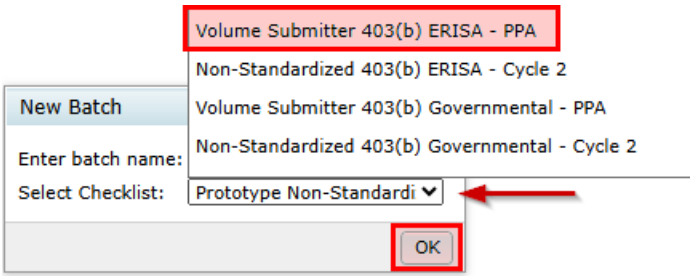
403(b) Batch Restatement

10/07/2025 2:09 pm CDT

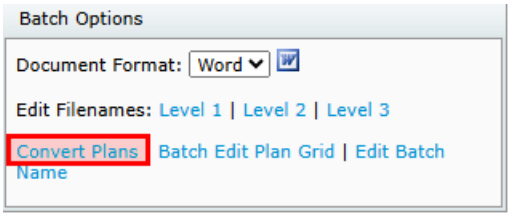
To restate your PPA 403(b) Plans to Cycle 2 using the DocPrint feature, first create a batch selecting one of the 403(b) PPA plan types from the drop-down menu. For example, to restate your PPA 403(b) ERISA documents, you would choose the Volume Submitter 403(b) ERISA - PPA, from the list. Once you make your selection, click "Ok".



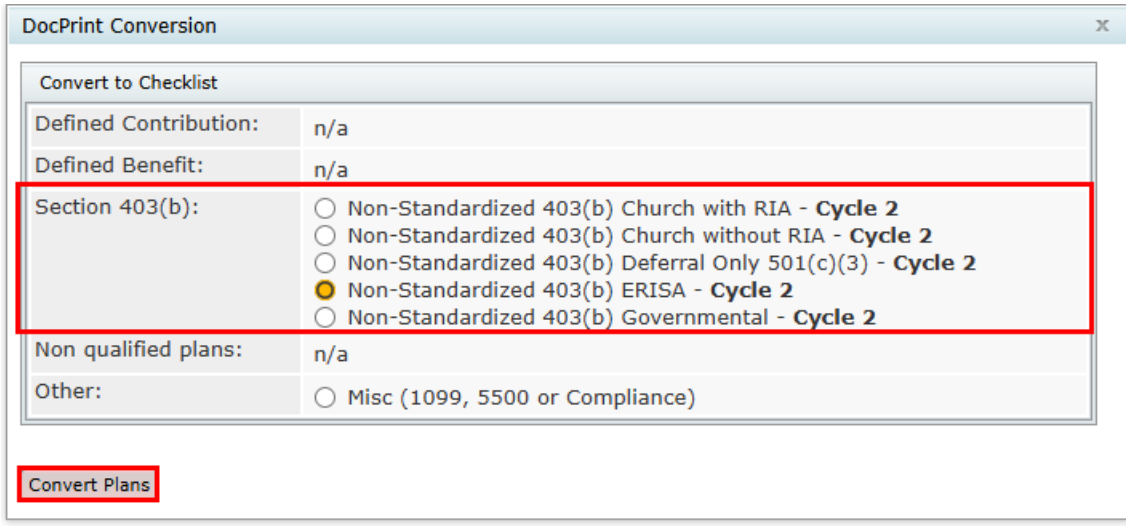
Next, you can add your plans. Please refer to "Adding Plans to a Batch" in this guide for the steps to add plans to your batch.

After you have added your plans, you now proceed with the conversion process.

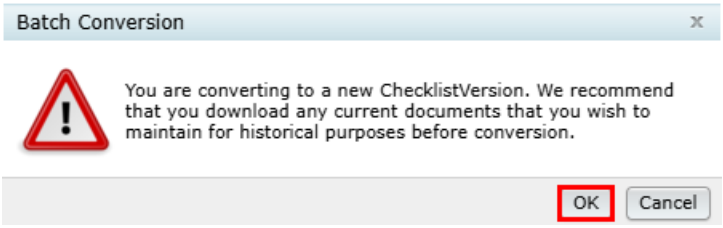
1. Click on the "Convert Plans" link located under the "Batch Options" menu.



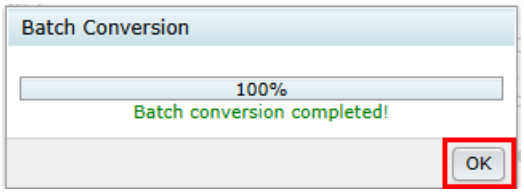
2. The software will display a list of Cycle 2 403(b) plan checklists that you can choose from. Select the radio button to the left of the Cycle 2 403(b) checklist you wish to convert to and then click on the "Convert Plans" button at the bottom.



PLEASE NOTE: Prior to converting documents, we do recommend that you download your documents as the conversion process is irreversible. To download your documents before converting, click on the "Cancel" button. If you are ready to proceed, click on the "Ok" button.

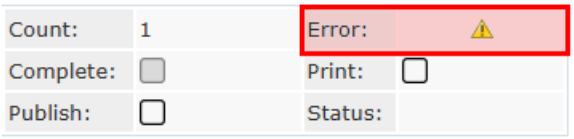


A progress bar will appear to indicate the progress of the conversion. Once the bar has reached 100%, you can proceed by clicking "Ok".

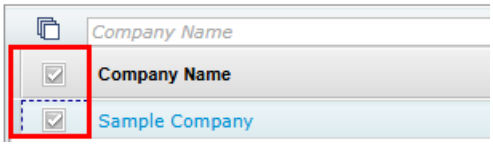


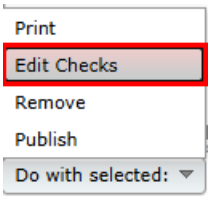
3. Now that your plans have been converted to Cycle 2, you have the option of updating plan parameters within the batch. Please refer to,"Update Plan Parameters for Multiple Plans" in this guide for details.

4. It is recommended to run the edit checks before proceeding. To run the edit checks for all plans in your batch, go to the top of the batch screen and click on the symbol next to "Error".



To run edit checks on select plans from your list, select the plans, then click on the "Do with selected".





5. After all edit checks are passed, you can now proceed with printing your Cycle 2 documents or publish them to the Portal.

- Please refer to "Printing Documents" in this guide for how to print your Cycle 2 403(b) documents.
- Please refer to "Publishing Documents in the Portal" in this guide for how to publish your Cycle 2 403(b) documents to the Portal.