

Steps for Compliance Data Transfer

10/29/2025 11:00 am CDT

DC Compliance (Company A & Company B)

Company A can download an export ZIP file from the compliance module for each plan. However, these files are specific to the original company code and plan, and cannot be directly imported into your system.

To complete the import, our development team can assist for a fee. We would request a quote from them to estimate the time required.

Optional Step: Manual DC Setup (Company B)

If your team prefers to handle DC compliance independently ("from scratch"), you would:

- Complete Steps 1 and 2.
 - Gather census data from Company A.
 - Manually load the data into each plan.
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