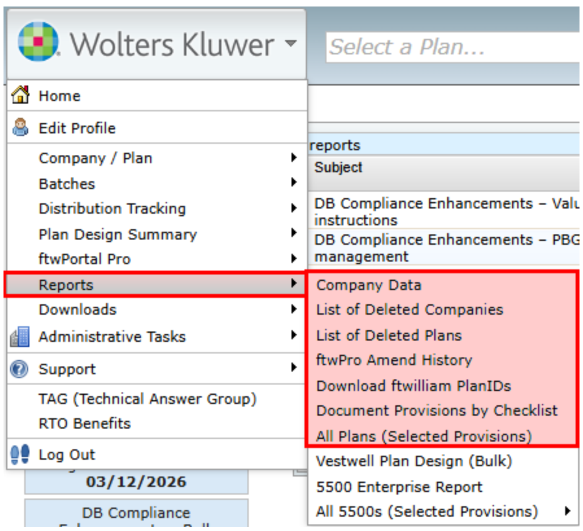
Reports

04/02/2026 3:11 pm CDT

There are a variety of reports accessible to provide comprehensive information for users with Administrative Permissions. Available reports include company data, plan provisions, and additional related information. These reports help users review key details and analyze plan structures.

Plan Document Reports

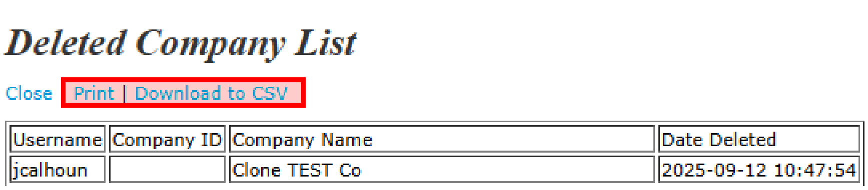
Designated Admin users can access plan document reports from the Wolters Kluwer menu, select Reports, followed by the report you wish to access.



Below is a description of each plan document document report available.

1. Company Data - generates a CSV file listing all companies in your account, including all information available from the Edit Company page.

2. List of Deleted Companies - provides a list of companies deleted from your account detailing the Username, Company ID (if applicable), Company Name, and Date Deleted. This report can be printed or downloaded to a CSV file.



Deleted Company List

Close Print | Download to CSV

Username	Company ID	Company Name	Date Deleted
jcalhoun		Clone TEST Co	2025-09-12 10:47:54

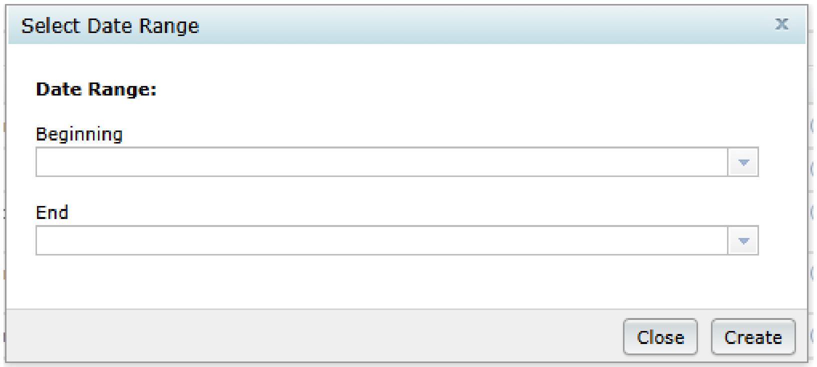
3. List of Deleted Plans - provides a list of plans deleted from your account detailing the Username, Plan ID (if applicable), Plan Name, Plan Number, Plan Type, Checklist, Checklist Version, and Date Deleted. This report can be printed or downloaded to a CSV file.

Deleted Plan List

Close | Print | Download to CSV

Username	Plan ID	Plan Name	Plan Number	Plan Type	Checklist	ChecklistVersion	Date Deleted
jcalhoun		Created from MEP Tool POST Co MASTER Plan	001	4KPT	VolSub	POST	2025-09-12 10:47:34

4. ftwPro Amend History - generates a CSV file that lists detailed amendment records after selecting a date range. This report includes Company Name, Customer ID (if applicable), Plan Name, Plan ID (if applicable), Date of Change, User, Section, Line Number, VAR, Question, Old Value, New Value, and Amendment Date.

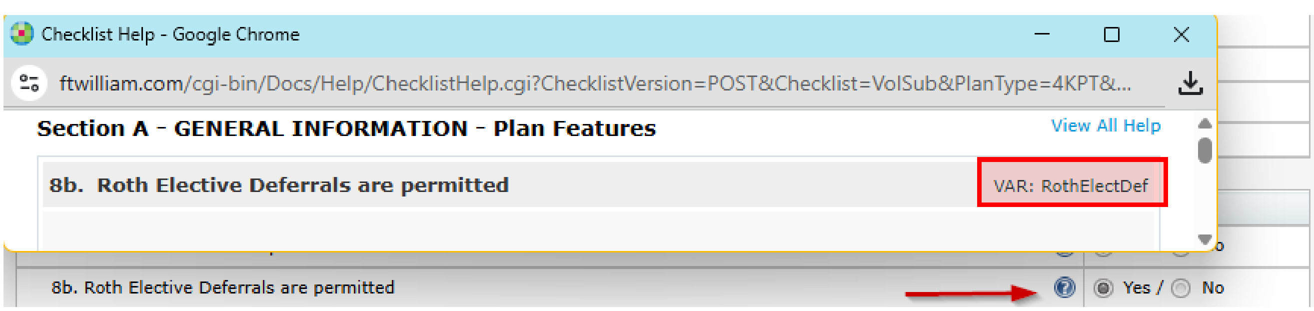


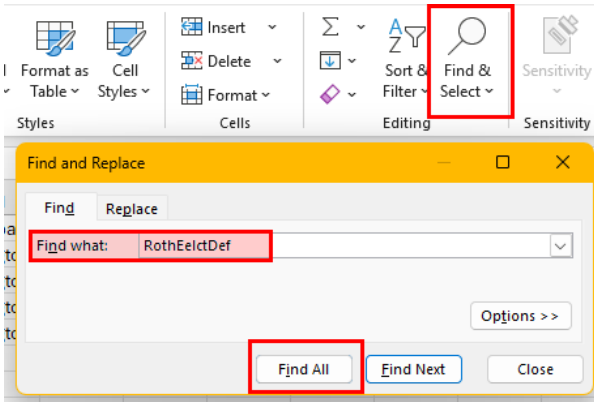
5. Download ftwilliam Plan IDs - generates a CSV file of all plans on your account. Provides FTW Customer ID, FTW Plan ID, Customer ID (if applicable), Plan ID (if applicable), Company Name, Company EIN, Checklist, Plan Type, Plan Number, and Plan Name.

	A	B	C	D	E	F	G	H	I	J	K
1	FTWCustomerI	FTWPlanID	CustomerID	PlanID	CompanyName	CompanyEmployerID	Checklist	PlanType	PlanNumber	PlanLine1	PlanLine2
2	2266476855	2801237353			ABC Company Inc MEP DEMO	99-9999999	VolSub	4KPT	001	ABC Company Inc 401(k) Plan	

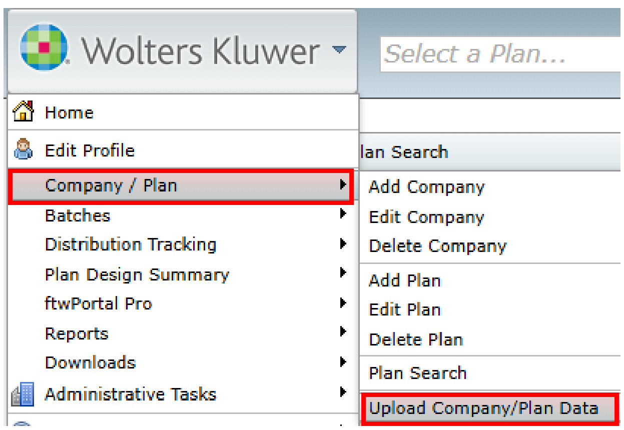
6. Document Provisions by Checklist - generates a CSV file of all plans on your account per checklist type. Provides details of plan provisions, allowing users to determine if a plan has a certain plan provision, change provisions, and upload those changes to the software.

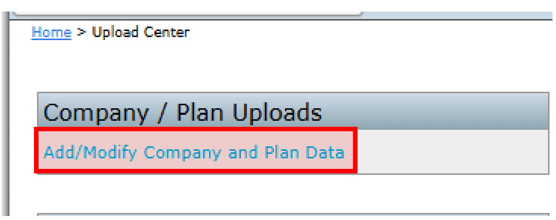
- Tip: To remove data from disabled fields, choose "Applicable Data Only".
- Tip: Use sorting and filtering options to quickly organize and review plan provisions.
- Tip: Locate a specific plan provision by searching for its column header (VAR); you can find the VAR in the plan checklist by clicking the help (?) icon next to the question. For example, to find which plans offer Roth contributions, you can go the plan checklist, click on the "?" next to A.8b. to locate the VAR in the upper right corner of the help text. You can then do a search for the VAR in the CSV file. The VAR will be listed as the column header.

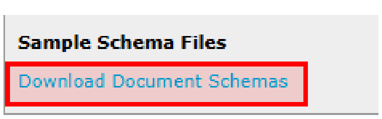




- Tip: You can obtain multiple VARs by downloading the document schema. From the Wolters Kluwer menu, select Company/Plan, followed by Upload Company/Plan Data. On the next page, click "Add/Modify Company and Plan Data". At the bottom of the next page, click on the link "Download Document Schemas". The CSV file will include all VARs in Column D. Column A will provide the question from the checklist, Column B will provide the applicable section in the checklist. Column C will provide the question number.







7. All Plans (Selected Provisions) - generates a CSV file of all plans on your account. Providing Division (if applicable), Company Name, Customer ID (EIN), Company Data from Edit Company page, Checklist, Plan Type, Checklist Version, Plan Name, Plan Number, Plan ID (if applicable), Admin, and Resp For fields for each module that you subscribe to.