Plan Document Demo Outline

1. **The Home Screen**
    a. Search Results box
        i. Buttons
            1. Allows you to quickly navigate to different modules once your companies and plans have been set up

    b. Plan Search box
        i. Quickly search for a company or plan

    c. Wolters Kluwer button
        i. can access almost any feature from this button
        ii. accessible from all screens

2. **Adding a Company/Plan**

<u>Add a Company</u>

    a. Select *Add Company* on Home Screen or through Wolters Kluwer button

    b. Enter Company name and EIN
        i. EIN Lookup Tool
            1. Type in company name and state and select correct company

    c. Select *Add Company*
        i. Searches DOL website for previous filings based on EIN
        ii. 2 options:
            1. Select a filing year to populate basic company information

            2. Manually add company information
                a. Select *Click Here to Return*

    d. Edit Company screen
        i. Fill in various fields with company information
        ii. Information will save automatically – no need to click a save button

<u>Add a Plan</u>

    e. Select *Add Plan*

    f. Add Plan name & select Checklist type

    g. Select *Add Plan*

3. **Editing a Plan**
    a. Edit Plan Screen

    b. Plan Checklist
        i. Select each section to expand or select *Expand All*

        ii. Some answers are there through system defaults

        iii. **?** – context-sensitive help buttons
            1. directs you to information on how to fill out that line item

        iv. + - click to see fields hidden based on previous answers

c. ZZZ Defaults
   i. allows you to set your own defaults
   ii. located under Wolters Kluwer button > Administrative Tasks > Defaults > ZZZ Defaults

d. Clone Plan Feature
   i. creates a copy of an existing plan
   ii. located under Plan Menu
   iii. Select the company for which the new plan will be created from the drop down menu
   iv. Select *Clone Plan*
   v. Directs to new plan

4. **Edit Checks**
   a. can run on section by section basis or everything at one time
   b. Select yellow triangle to run
      i. red circle with X – needs editing
      ii. green circle with check – passed
   c. *GoTo* Link will open and highlight the line item

5. **Show History Feature**
   a. located in Plan Menu box
   b. will show who did what when
   c. *UPDATE* link – show changes made by user
   d. *Revert* link – undo changes that have been made to the checklist
   e. *Create* link – add note

6. **Generating and Printing Your Forms**
   a. Select Plan Documents button in Plan Modules box on Edit Plan screen
   b. Select the Document Format under Plan Documents Menu
   c. *Global Document Print Settings* link – set your own print settings
   d. To print
      i. Select the link to the document you are printing or select multiple items
      ii. Click *Do With Selected* and chose an option
      iii. PortalPro will allow you to securely communicate send files to and from clients without having to download and email or print and mail your forms
         1. e-signing is also available with PortalPro

7. **Amendments**
   a. We do provide a sample amendment template under Documents/Forms
   b. ftwPro Amend (add-on subscription)
      i. available for Prototype style plans
      ii. if you need to make a change to your checklist, instead of needing to copy, paste, and build the amendment yourself, ftwPro Amend is an automated feature to generate an amendment

8. **Batch Features**
    a. Go to Wolters Kluwer button > Batches > (select your option)

    b. Select the year end to print

    c. Select *Create New Batch* button

    d. Add the plans you want to print by clicking *Add Plans* button

    e. Fill out additional info and select *Generate Documents* link when ready
        i. Will create a zip folder containing separate files for each of the documents

    f. Automatic delivery feature (available with ftwPortal Pro subscription)

9. **Reports**
    a. Go to Wolters Kluwer button > Reports > (select your option)
    b. creates Excel file of report

10. **Additional Features**
    a. Download blank Checklists and blank Adoption Agreements
        i. Wolters Kluwer button > Downloads

    b. Create customized Edit Checks
        i. Wolters Kluwer button > Administrative Tasks > Create Custom Edit Checks

    c. Updates box
        i. recent email updates from ftwilliam.com will display here
        ii. *View All* link will show you all historical email updates that we have sent out