

Q & A from DC/Win Default Plans – using and creating Webinar Presented Live November 29, 2007

Q: What is the best way to create our own default plans?

A: You can either copy a default plan or an existing plan to create your own default plan.

To create a default plan by copying a default plan, use the Copy Plan option and change the Plan Ident and Plan Number. Once the default plan is copied, you can change the plan name, plan number and any other plan, source or investment fields.

To create a default plan by copying an existing plan, use the Copy Plan option and change the Plan Ident and the Sponsor Ident. Once the existing plan is copied, change the plan status to Default on the Plans\Plan/Sponsor\Plan/Trust screen. Because default plans do not contain employee records, the system will delete any employee records from the copied plan. Then you can change the plan name and any other plan, source or investment fields.

Q: Do you have to run calculations prior to copying the default plan to a new default plan?

A: Calculations do not need to be run prior to copying the default plan.

Q: In the Copy Plan screen, do you use the three "Clear" boxes to delete employee records when creating default plans?

A: It is not necessary to select the three boxes to clear employee records when you Copy Plan for creating a default plan. After you Copy Plan to a new Plan Ident and Company Ident, changing the plan status to Default will assign the plan to the Default sponsor and delete any employee records.

Q: When creating a default plan, what do you do if you don't know payroll frequency?

A: Default plans are just a plan template used to help you create a new plan. There more than likely will be some necessary changes in coding the plan so the DC/WIN provisions match the plan document, investments and/or payroll frequencies. If you don't know the payroll frequencies or other provisions, you can guess what the most likely scenario will be for the default plan. Then when setting up the new plan, change the frequencies or other coding as necessary.

Q: What is the process of going from a default to a new plan?

A: When setting up a new plan, you will select the blank page in the tool bar, select New in the Select Sponsor for Plan screen and then choose the default plan that you want to use for the new plan. Do not open a default plan by choosing the folder in the tool bar and then change the plan status to Active. This will overwrite your default plan.

Q: What happens if you overwrite your plan default?

A: It is possible to overwrite both the system and your own default plan. You can Copy Out a default plan and save the file in any folder or drive where you can access it in the future. If you accidentally delete or change a default plan but you previously saved the default plans via a Copy Out, you can just Copy In the saved default plans. If you did not Copy Out the default plans and the defaults were accidentally erased, you can either create your own default plan from an existing plan. Or you can contact DATAIR Customer Support for assistance with reloading the DATAIR provided default plans.

Q: Will our created default plans become obsolete when there is a new release?

A: The default plans that come with the DC/WIN system are automatically reset upon a new version release. If you create your own default plans and save them under different Plan Idents, your default plans will not be overwritten upon update.

Q: Can you make the defaults available system-wide through a network?

A: If you have a shared network database, your default plan will be available to others using the database. If you are on a network but do not use a shared database (i.e. – you only see the plans assigned to you), you can share the default plan with others on your network by Copying Out the default plan and saving the file in a place accessible by others on your network. Finally, if you are not on a network but would like to share your default plan with others, you can Copy Out the default plan and email the file to another workstation or you can Copy Out to a portable device and Copy In the default plan on another workstation from the portable device.

Q: Can you explain the relationship between the Sponsor Name, Plan Name and Plan Number when setting up a new plan?

A: The real relationship runs between the Sponsor's Company Ident, Plan Ident and Plan Numbers. You cannot have more than one Sponsor with the same Company Ident; you cannot have more than one plan with the same Plan Ident nor can a Sponsor have a Company Ident with multiple plans having the same Plan Number. You can set up a Sponsor with one Company Ident having more than one unique Plan Idents and Plan Numbers. For example, a Sponsor can have a Company Ident of XYZ, Plan Idents of PlanA, PlanB and PlanC with corresponding Plan Numbers of 001, 002, 003. All of these plans would have the same employee census since employee data is stored on a Company basis.