Show History

12/19/2024 2:26 pm CST

On the "Edit Plan" screen, the "Show History" link is a useful feature located below the "Plan Menu" near the upper-right corner of the screen, as highlighted in the image below.

	Wolters Kluwer		le Company ((ID: PlanID) (Plan Number: (001)	- Go -	
wollers kluwer		Select a	Select a Plan From History					
Home > Edit Co	mpany > Edit Plan						Pi	an Notes 🔛 Updates Help
Company:	Example Company 🔹 ID: CustID 🥒			1		P	lan Menu	
Plan:	Example Company	Ŧ	ID: PlanID 🕖				Convert Plan Clone Plan	1.
Checklist:	Misc (1099, 5500	or Compliar	ice)				Delete Plan	
Details:	EIN: 86-7530932 •	PN: 001 • PY	E: 12-31				Document H	istory
Plan Module	es							0
Plan Documents IRS Fo		Forms	5500 Forms	1099-R 💌 2022 🗸	Compliance	Portal	Proposal	Distributions
Yes	* Yes	*	Yes 👻	Yes 👻	Yes 👻	Yes 👻		Yes 👻
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Plan Check	list - Expand All Applicat	le / Expand All	/ Collapse All					
A. Gen	eral Information							

Clicking on the "Show History" link opens the "History" screen, shown in the example below. This example displays a plan with 5500 and ftwPortal Pro data only. If a plan document had been added, changes to the plan checklist would also appear here.

This screen records activity details associated with the plan. For example, if the draft screen of a 5500 filing has been viewed, the date and time will be noted as "Viewed." Similarly, if a 5500 return/report is locked, it will appear in the history as "Locked."

Home > Edit Cor	mpany > Edit Plan > I	History			Plan Notes 📴 Updates
Company:	Example Company		ID: CustID 🥒		
Plan:			ID: PlanID 🥒		
Checklist:	Misc (1099, 5	5500 or Compli	ance)		
Details:	EIN: 86-75309	32 • PN: 001 • I	PYE: 12-31		
User	Туре	Module	Document/Area	Date	Note
Devido	Туре	Module	Document/Area	Date 2022 00 10 15 11 10	Note
Evample	LIPDATE	Plan Document	Misc-W/	2023-08-31 16-34-10	Locked
Example	UPDATE	Plan Document	Misc-WL	2023-08-31 16:34:08	Converted Checklist/PlanType/ChecklistVer
DavidR	VIEW	5500	5330 - 2022	2023-08-25 10:25:30	
DavidR	EMAIL	Portal		2023-08-25 09:15:10	Example Company Annual Questionnaire R
DavidR	EMAIL	Portal		2023-08-25 09:14:51	Example Company - 12/31/2023 Year End
DavidR	UPDATE	Portal		2023-08-25 09:14:40	CenQuestionnaireUL=Yes;CenSpreadSheet