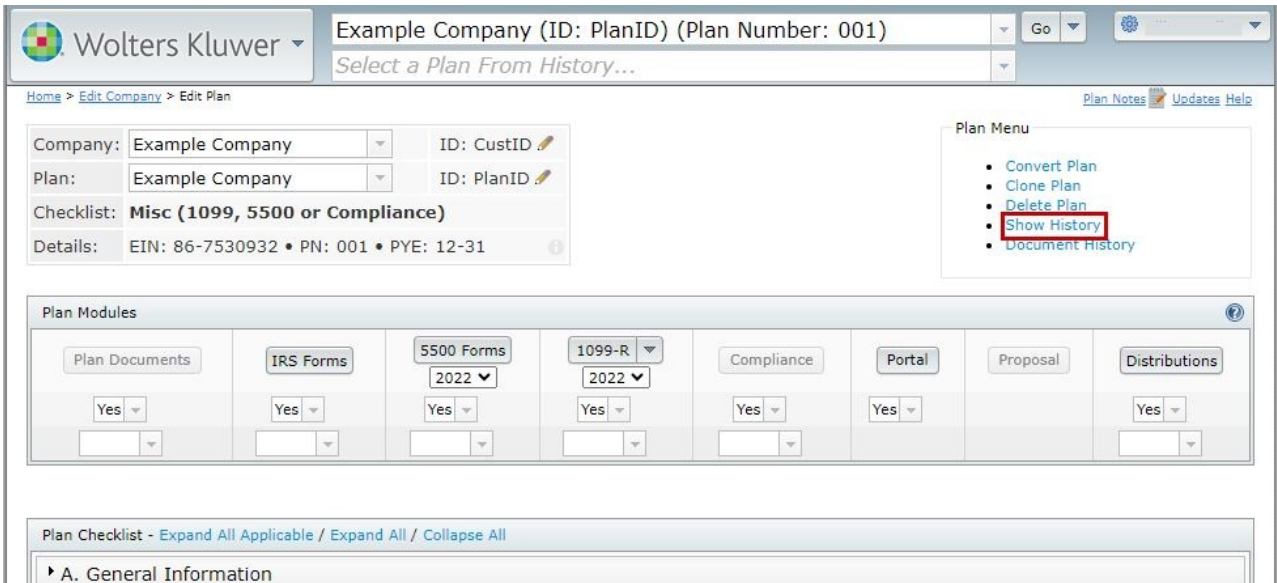


Show History

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.



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."

