

Edit Company

08/16/2024 3:37 pm CDT

After you've selected a company, you can enter and update company data from the Company Data checklist. By default, the list will display all relevant sections of the checklist; fields which are not applicable based on other answers will not be displayed, and in their place you will see a



sign to expand the section --e.g. 10b: Union Representative will not be displayed unless 'Union' is selected for 10a.

For more info on each entry, you can hover you cursor over the



icon next to the Company Checklist to see a brief summary, or click on the



to read a longer description.

Select a Plan...

Go

Workflow

test permissions

Home > Edit Company

Help

Company: Acme

ID:

Plan: Select a plan...

☐ Update unlocked 2013 5500s and 8955-SSAs with applicable data from this page. ??

☐ Update unlocked 2013 1099s with applicable data from this page. ??

Update

Company Menu

- Delete Company
- Add Plan

Company Data

Expand All Applicable / Expand All / Collapse All

Company Information:

Additional Company Information:

Contact Information:

Notes:

30. Notes

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