

Responsible For

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The 'Responsible For' option displays on the Edit Plan screen below each module you have purchased within the Plan Modules box. With this option you can select whether your firm is responsible for the tasks in each module for the plan, such as filing 5500s, or completing compliance testing. These values are referred to within workflow grids, and can be used to hide the plan from your plan/batch lists. If you are no longer responsible for managing a plan, but do not want to delete the plan, you can set 'Resp' to **No** for each module. This will prevent the plan from appearing in the plan list in the navigation bar, and from the plan list on the Home screen by default.
