

Delete A Plan

08/15/2024 1:55 pm CDT

Deleting a plan will permanently remove the plan from the system, as well as all completed forms and filings. If you might need access to the plan again in the future, we recommend you mark the plan as one you are no longer responsible for. Plans you are no longer responsible for will not appear in plan search results.

To delete a plan, select the plan with the Navigation Bar, or click **Edit Plan** next to the plan from the Home screen. From the **Plan Menu** in the top right beneath the Navigation Bar, click **Delete Plan**. You may cancel deleting the plan on the following screen by clicking **Cancel and Return to Previous Page**, otherwise click **Delete Plan** once more.
