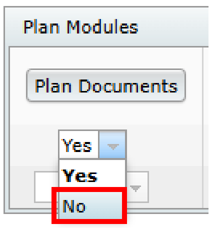
Delete Plan

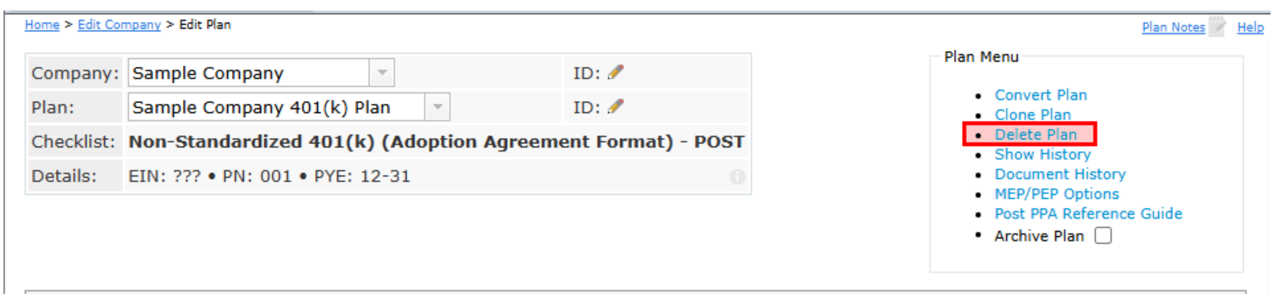
12/05/2025 9:57 am CST

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 not responsible for. You can mark a plan as not responsible from the Edit Plan page. Under "Plan Modules" select "No". The plan will no longer pull into batch features or reports.



In addition, you can convert the plan to a Misc. checklist from a document checklist. Refer to "Convert Plan" for steps in converting a document checklist.

If you have determined that the plan can be deleted (e.g. duplicate plan with no history), click on the "Delete Plan" link under the Plan Menu on the Edit Plan page.



Confirm that you want to delete the plan by clicking on the "Delete Plan" button. Once a plan has been deleted, this transaction cannot be undone.