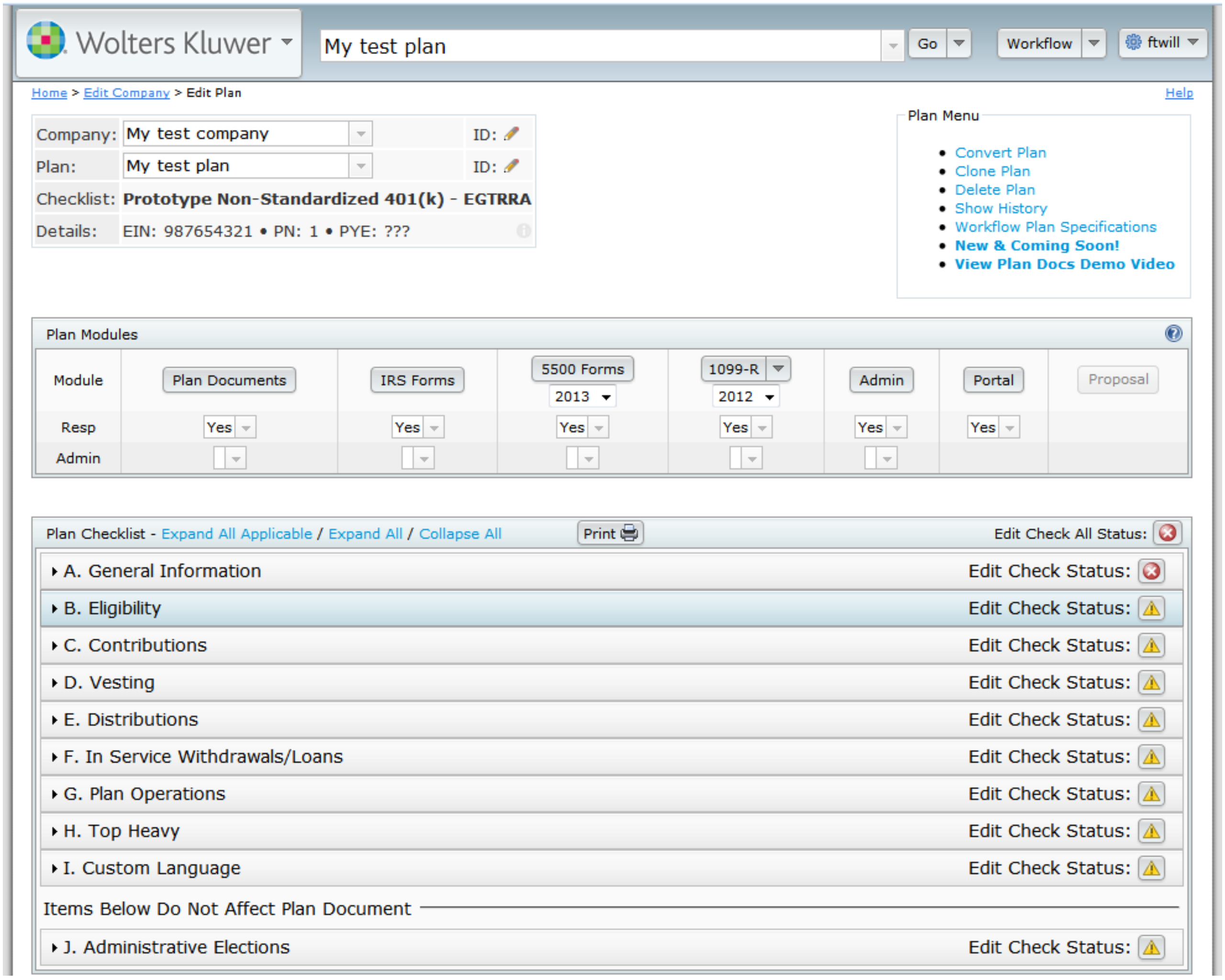
Edit Plan

08/16/2024 3:39 pm CDT



Edit Plan

The Edit Plan screen is the home page for each plan and enables you to access each available module for the plan, such as Admin, 5500s, Portal, etc., as well as edit data about the plan itself. In the top left, you will see the basic information about the plan, including:

- Company Name
- Plan Name
- Checklist Type
- Employer Identification Number, Plan Number, and Plan Year End (EIN, PN, and PYE respectively)
- Company ID* - a Unique ID for the company assigned by an Admin user
- Plan ID* - a Unique ID for a plan assigned by an Admin user

> *If you are an Admin user, a
> icon will appear next to the field. Click the icon to edit the field, and the field will automatically save. Click the
> icon to discard any changes you've entered.

This information is displayed on the home screen for all modules and the top right will feature functions for each module. For example, in the Plan Document module, the Plan Document Menu allows users to choose between Word and PDF output formats, Print IRS Letters for the plan, etc.

Using the drop-down options under Company Name and Plan Name, you can quickly navigate between plans and companies you would like to work with. Selecting a different Company Name will direct you to the Edit Company screen with that company selected; selecting a different Plan Name will not change which screen you are currently viewing but will change which plan you have selected