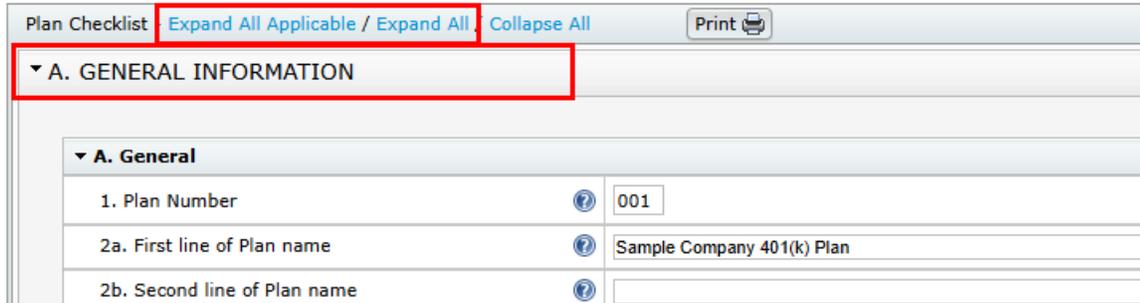


Editing the Checklist

03/17/2026 2:43 pm CDT

The sections in each checklist will vary depending on the checklist type. To view the questions in each section, you can expand all, expand all applicable or by section.



The screenshot shows a checklist interface. At the top, there is a header bar with the text "Plan Checklist" followed by three buttons: "Expand All Applicable / Expand All", "Collapse All", and "Print". The "Expand All Applicable / Expand All" button is highlighted with a red border. Below the header, there is a section titled "A. GENERAL INFORMATION" with a dropdown arrow. Underneath, there is a sub-section titled "A. General" with a dropdown arrow. Below this, there are three rows of questions:

1. Plan Number		001
2a. First line of Plan name		Sample Company 401(k) Plan
2b. Second line of Plan name		

Expand All - will display all checklist questions even if they are not applicable from a response of another checklist questions.

Expand All Applicable - will display only questions that are applicable based on responses to another checklist question.

Expand by Section - to display one section at a time, you can click on the section name to expand.

After making an entry or selection in the checklist, the software will auto save once you move your cursor or press the Tab key. Once you have made all your entries in the checklist, the next step is to run the Edit Checks.

At the top of the checklist, you can edit check all sections by clicking on the yellow triangle next to "Edit Check All Status".



The screenshot shows a checklist interface. At the top, there is a header bar with the text "Plan Checklist - Expand All Applicable / Expand All / Collapse All" followed by a "Print" button. On the right side of the header bar, there is a button labeled "Edit Check All Status" with a yellow triangle icon next to it. The "Edit Check All Status" button and its icon are highlighted with a red border.

An Edit Checks pop-up window will generate by section notifying you if that section has passed the edit checks, has errors or warnings that need your attention.

Company: **Sample Company**
Plan: **Sample Company 401(k) Plan**

Key:  **Error**  **Warning**

[Close Edit Checks](#) - [Re-run Edit Checks](#)

Section A - GENERAL INFORMATION

FW-Required-PCElectiveOtherAdjText:

 **A.16a.viii** - This field is required and cannot be blank.[\(Go To\)](#)

FW-Required-PCMatchOtherAdjText:

 **A.16b.ix** - This field is required and cannot be blank.[\(Go To\)](#)

FW-Required-PCNonElectiveOtherAdjText:

 **A.16c.ix** - This field is required and cannot be blank.[\(Go To\)](#)

[Close Edit Checks](#) - [Re-run Edit Checks](#)

Section B - ELIGIBILITY

No Problems Found.

[Close Edit Checks](#) - [Re-run Edit Checks](#)

Section C - CONTRIBUTIONS-ELECTIVE DEFERRAL AND SAFE HARBOR

FW-11733:

 **C.6** - NOTE: If the plan is an EACA and C.6 (Covered employee means) is not 'All Eligible Employees', the Plan will not qualify for the extended period for refunds of ADP/ACP testing failures.
[\(Go To\)](#)

Edit Check Status: 

Red Circle with X - indicates an error to be corrected.

Yellow Triangle - indicates a warning that you should take note of.

Green Check Mark - indicates the checklist is passing.

(Go To) Link - you can click on this link to take you to the question to update in the plan checklist.
