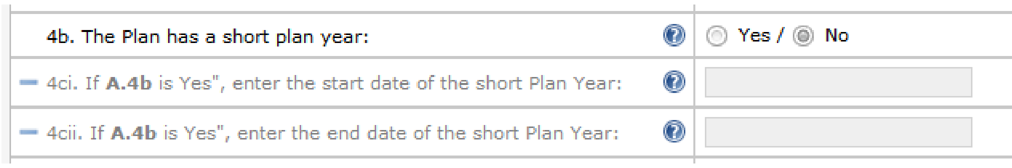
Editing the Checklist

08/16/2024 3:42 pm CDT

Each checklist type features different sections, and fields though you can edit them all the same. To display the content of any section, click anywhere on the section next to the section letter index A-J, and all the relevant checklist options will appear for the selected plan's Checklist Type.

The sections listed will vary depend on the checklist the plan is using. To view the checklist questions in each section, you can click **Expand All**, **Expand All Applicable**, or click the section header itself. **Expand All** will display all checklist questions even if they are disabled from the response of another checklist question. For example, if question 4b for a Prototype Non-Standardized 401(k) plan is 'No', questions 4ci, and 4cii will still be listed, but will appear grayed out and disabled (unable to enter text, or select an option).



Expand All Applicable will still list the blank entry, but not display the question or entry field:

You can also expand each section one at a time by clicking the section name, as well as each sub-section.

After making an entry in a text or date field, you do not need to click any buttons to submit; when you move your cursor the field will automatically save: clicking elsewhere on the page, or pressing the Tab key, for example. When the document checklist has been successfully updated, you will see a confirmation icon (

) next to the updated field.

If the field fails to update, you will see the failed upload icon (

). If you cannot update the text field, try refreshing the page to verify you are still logged in, and that you currently have an internet connection.