

Quick Start User Guide

08/19/2025 3:25 pm CDT

Edit Company

After you've selected a company, you can enter and update company data from the Company Data checklist. By default, the list will display all relevant sections of the checklist; fields which are not applicable based on other answers will not be displayed, and in their place you will see a



sign to expand the section --e.g. 10b: Union Representative will not be displayed unless 'Union' is selected for 10a.

For more info on each entry, you can hover your cursor over the



icon next to the Company Checklist to see a brief summary, or click on the



to read a longer description.

Wolters Kluwer Select a Plan... Go Workflow test permissions

[Home](#) > Edit Company [Help](#)

Company: Acme ID:

Plan: Select a plan...

☐ Update unlocked 2013 **5500s and 8955-SSAs** with applicable data from this page. ??

☐ Update unlocked 2013 **1099s** with applicable data from this page. ??

Update

Company Data Expand All Applicable / Expand All / Collapse All

▶ Company Information:

▶ Additional Company Information:

▶ Contact Information:

▼ Notes:

30. Notes

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Add Plan

After you have created a Company, you can add new plans to associate with a company. If you used 55Autofill to add a Company, all plans reported to the DOL which are associated with the EIN will be added to the system for you.

Company Menu

- [Delete Company](#)
- [Add Plan](#)

To add a plan to a company, you can either select **Company/Plan** from the Wolters Kluwer logo button, then select **Add Plan**, or from the Company Data checklist click **Add Plan** from the **Company Menu** in the upper right. You may also add a plan via file upload.

Responsible For

Responsible For

The 'Responsible For' option displays on the Edit Plan screen below each module you have purchased within the Plan Modules box. With this option you can select whether your firm is responsible for the tasks in each module for the plan, such as filing 5500s, or completing compliance testing. These values are referred to within workflow grids, and can be used to hide the plan from your plan/batch lists. If you are no longer responsible for managing a plan, but do not want to delete the plan, you can set 'Resp' to **No** for each module. This will prevent the plan from appearing in the plan list in the navigation bar, and from the plan list on the Home screen by default.
