Plan Document Software User Guide

12/19/2024 3:30 pm CST

Edit Company

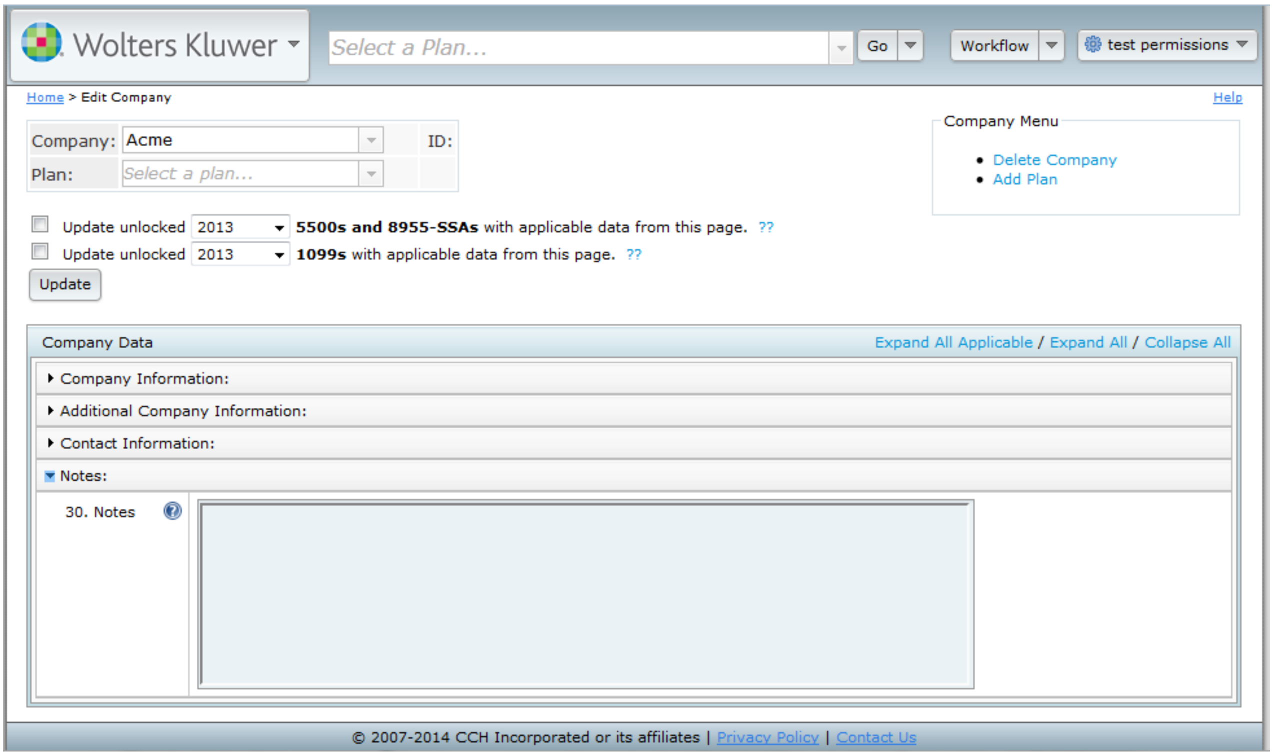
After you've selected a company, you can enter and update company data from the Company Data checklist. By default, the list will display all relevant sections of the checklist; fields which are not applicable based on other answers will not be displayed, and in their place you will see a

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 you cursor over the

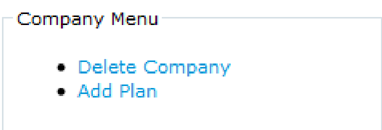
icon next to the Company Checklist to see a brief summary, or click on the

to read a longer description.



Add A 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.



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.

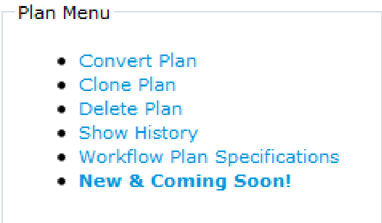
Responsible For

Responsible For

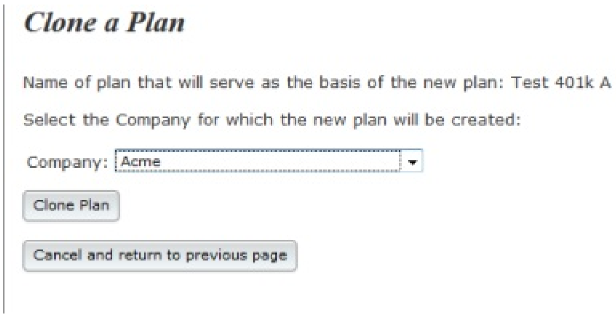
The ‘Responsible For’ option displays on the Edit Plan screen below each module you have purchased within the Plan Modules box. With this option you can select whether your firm is responsible for the tasks in each module for the plan, such as filing 5500s, or completing compliance testing. These values 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.

Clone A Plan

Clone Plan



If you would like to add a plan which is very similar or identical to another plan, you can clone the original plan rather than creating a new plan and re-entering the information. Cloning a plan will copy the checklist answers of the selected plan to a new plan for an existing company that you have created on the system. If you would like to add the plan to a new Company, you will need to create the company prior to cloning the plan. You will not need to create a new plan, which will be done by the Clone Me feature. To clone a plan, simply navigate to the **Edit Plan** screen by either selecting the plan in the Navigation Bar, or from the Home screen. In the Plan Menu click **Clone Plan**, then in the next screen, select a company to associate with the cloned plan.



Delete A Plan

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 one you are no longer responsible for. Plans you are no longer responsible for will not appear in plan search results.

To delete a plan, select the plan with the Navigation Bar, or click**Edit Plan** next to the plan from the Home screen. From the **Plan Menu** in the top right beneath the Navigation Bar, click **Delete Plan**. You may cancel deleting the plan on the following screen by clicking **Cancel and Return to Previous Page**, otherwise click **Delete Plan** once more.