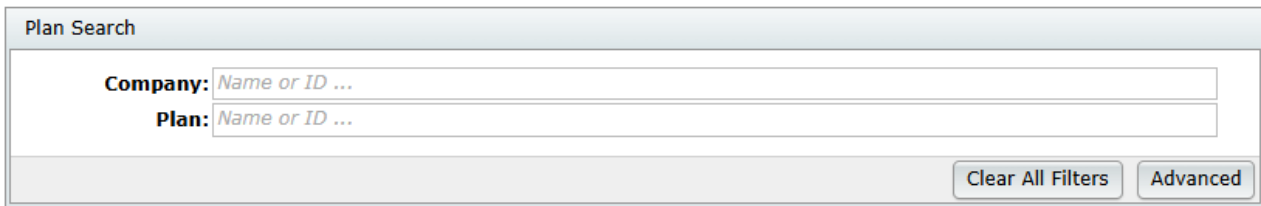


# Plan Search / Filter

12/19/2024 2:52 pm CST



The screenshot shows a window titled "Plan Search". It contains two input fields: "Company: Name or ID ..." and "Plan: Name or ID ...". At the bottom right, there are two buttons: "Clear All Filters" and "Advanced".

The Plan Search box allows quick searches for a Company or Plan using one or a combination of:

- Company Name
- Plan Name
- Company ID
- Plan ID

Partial matches are supported, so typing the first few unique characters of a name will display all matching results, often enough to locate the desired Company or Plan.

For advanced searches, click the **Advanced** button.



This screenshot is identical to the previous one, but the "Advanced" button is highlighted with a red rectangular border.

This provides additional search options, including

- Employer Identification Number (EIN)
- Plan Number
- Plan Type (a drop down menu populates with the different checklist options)
- Plan Year End
- MEP/PEP (a drop down menu populates with the selection of Master, Adopting Plan, Both)
- 5500 Admin
- Document Admin
- Compliance Admin

The advanced search also includes an option to display plans with all modules marked as "No" for "Resp" on the Edit Plan screen. Note: Plans marked as "No" for "Resp" across all modules are hidden from Plan Search results unless the **Show Non-Resp Plans** box is checked.

To hide the **Advanced** search options, click the **Simple** button in the bottom right of the Plan search window.

**Plan Search**

**Company:**

**Plan:**

Advanced Options

**EIN:**

**Plan Number:**

**Plan Type:**

**Plan Year End:**

**Show Non-Resp Plans:**

**MEP/PEP:**

**5500 Admin:**

**Document Admin:**

**Compliance Admin:**

The large **Search Results** box below the **Plan Search** box offers quick access to software modules for any plan. Use the drop-down menu next to **Edit Plan** or click the **Plan Name** to access the available modules listed below it.

By default, the Search Results box displays all companies and plans. To refine the list, refer to the Plan Search instructions above.

**A. Demo 401(k) Plan (ID: a.demo plan)** ← **Plan Name**

A. Demo Corp (ID: a.demo) ← **Company Name**

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