

Editing Plan Checklist

04/30/2026 4:16 pm CDT

The Edit Plan page is where you can access each available module for a plan, such as Plan Documents, 5500, Portal, etc. In addition, you can edit plan data.

Edit Plan

The Edit Plan page is where you can update plan specific data. In the top left, you will see basic information about the plan, including:

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

1	Company:	Sample Company	5	ID:	
2	Plan:	Sample Company 401(k) Plan	6	ID:	
3	Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST			
4	Details:	EIN: 99-9999999 • PN: 001 • PYE: 12-31			

1. Company Name
2. Plan Name
3. Checklist type
4. Employer Identification Number, Plan Number, and Plan Year End ("EIN", "PN", and "PYE" respectively)
5. Company ID - this is a unique ID for the company assigned by a User with Designated Admin permissions
6. Plan ID - this is a unique ID for the plan assigned by a User with Designated Admin permissions

PLEASE NOTE: If you have Designated Admin permissions, a pencil icon will appear next to the ID field. Click on the pencil icon to edit the field. Your entry will automatically save.

Checklist Type

All plan documents are associated with a checklist type depending on the document packages you have purchased.

- **Retirement Plan Documents:**
 - Standardized 401(k) (Adoption Agreement Format)
 - Non-Standardized 401(k) (Adoption Agreement Format)
 - Non-Standardized 401(k) (Adoption Agreement Format) - Answers Only
 - Non-Standardized 401(k) (ID Format)
 - Non-Standardized Money Purchase
 - Non-Standardized Governmental Money Purchase
 - Non-Standardized Governmental Profit Sharing
 - Non-Standardized Employee Stock Ownership Plan w/401(k)
 - Non-Standardized Defined Benefit Pension Plan (Adoption Agreement Format)
 - Non-Standardized Defined Benefit Pension Plan (ID Format)
 - Non-Standardized Cash Balance Plan (Adoption Agreement Format)

- Non-Standardized Cash Balance Plan (ID Format)
- Non-Standardized 403(b) Church w/RIA
- Non-Standardized 403(b) Church w/out RIA
- Non-Standardized 403(b) Deferral Only 501(c)(3)
- Non-Standardized 403(b) ERISA
- Non-Standardized 403(b) Governmental
- **Non-Qualified Plan Documents:**
 - Section 457(b) Plan
 - Section 409A Plan

Note: If you have not purchased a plan document module you will only have access to the 'Misc' plan checklist type. Plans using the Misc. checklist have access to the General Information section on the Edit Plan page. Plans using the Misc. checklist can still be used for all modules except the Plan Documents module.

Editing the Checklist

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.

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".

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.
