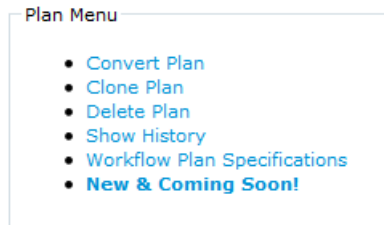


Show History

08/16/2024 4:00 pm CDT

The Show History screen enables you to review all modifications made to plan documents, displaying which user made the changes, when and what changes the user made. Designated Administrative users can also revert changes made to plan document checklists from this screen.



To access the Show History screen, click **Show History** in the top right corner on the Edit Plan screen under the Plan Menu for any plan.

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

[Help](#)

Company:	Quick-E Mart (div A) test	ID: QuickE
Plan:	Apu's Pension Plan (div A)	ID:
Checklist:	Defined Benefit Pension Plan (Proto Format) - EGTRRA	
Details:	EIN: 222222222 • PN: ??? • PYE: ???	

	User	Type	Module	Document/Area	Date	Note	Error
	test user	ADD	Plan Document	All	2014-02-04 10:43:42	Added Via Cloning, copied from [Quick-E Mart 401(k) (div A);]	
	test user:	UPDATE	Plan Document	Misc-WL	2014-02-04 10:44:57	ConvertFrom=ProtoNS:4K; ConvertTo=:Misc:WL	
	test user	UPDATE	Plan Document	Welfare-Cafe	2014-02-04 10:45:22	ConvertFrom=Misc:WL; ConvertTo=EGTRRA:Welfare:Cafe	
	test user	UPDATE	Plan Document	Welfare-Cafe	2014-02-04 10:45:45		
	nick	UPDATE	Plan Document	Welfare-Cafe	2014-02-05 11:15:55		
	nick	UPDATE	Plan Document	Misc-WL	2014-02-05 11:16:00	ConvertFrom=Welfare:Cafe; ConvertTo=:Misc:WL	
	nick	UPDATE	Plan Document	DefBen-DB	2014-02-05 11:17:13	ConvertFrom=Misc:WL; ConvertTo=EGTRRA:DefBen:DB	
	Apu N.	UPDATE	Plan Document	General Information	2014-02-06 10:38:24		
	Apu N.	UPDATE	Plan Document		2014-02-06 10:38:24		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-07 12:00:58		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-10 16:49:21		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-10 16:59:24		
Revert	nick	UPDATE	Plan Document	DefBen-DB	2014-02-10 17:03:36		
	nick	GENERATE	Docs	Adoption Agreement	2014-02-11 10:29:20		
	nick	GENERATE	Plan Document	Plan Document	2014-02-11 10:29:37		
	nick	GENERATE	Plan Document	Plan Document	2014-02-11 10:29:42		
	Apu N.	UPDATE	Portal		2014-02-11 11:40:01	update=add;username=1lmo;module=5500;	
	Apu N.	UPDATE	Portal		2014-02-11 11:40:01	update=add;username=1lmo; module=Document;	
	Apu N.	UPDATE	Portal		2014-02-11 11:40:01	update=add;username=1lmo;module=5500;	
	Apu N.	UPDATE	Portal		2014-02-11 11:40:14	View5500=Yes;	

The Show History screen also shows history such as when documents were generated, forms were printed, and updates were made changes to Portal users, etc for the selected plan. The Note column offers more details regarding the change; all changes you have made in the Plan Document module are logged, and you can click **Update** in the Type column to view any set of changes to the plan documents.

