

Plan Documents Permissions

08/16/2024 4:36 pm CDT

Master and Designated Admin users can control each user's permission for each document type: Retirement, Non-Qualified, and Welfare. For each document type, users can permissions to Edit, View only, or None. Master and designated Admin users have additional abilities to revert changes to plan checklists in the Show History screen.

Edit permissions enable the user to modify document checklist options as well as access the document modules.

Plan Checklist - Expand All Applicable / Expand All / Collapse All Print Edit Check All Status: ⚠

▼ A. General Information Edit Check Status: ⚠

▼ A. General

1. Plan Number:	<input type="text"/>
2a. First line of Plan name:	<input type="text" value="Apu's Pension Plan (div A)"/>
2b. Second line of Plan name:	<input type="text" value="test!"/>
3a. Original effective date of Plan:	<input type="text"/>

View only permissions enable the user to see all the document checklist options as well as access the Plan Document module. Users with view only permissions cannot edit the document checklist answers.

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Setting a user's permissions to the document module to 'None' will hide the document checklist options, as well as disable their ability to access the Plan Document module.

Home > Edit Company > Edit Plan Help

Company: My test company's test name ID: test things
Plan: Test DB Proto Plan ID:
Checklist: **Defined Benefit Pension Plan (Proto Format) - EGTRRA**
Details: EIN: 11-1111111 • PN: ??? • PYE: ???

Plan Menu

- Show History
- Workflow Plan Specifications
- New & Coming Soon!
- View Plan Docs Demo Video

Module	Plan Documents	IRS Forms	5500 Forms	1099-R	Admin	Portal	Proposal
Resp		Yes	2013 Yes	2012 Yes		Yes	
Admin							