9.1. Clone

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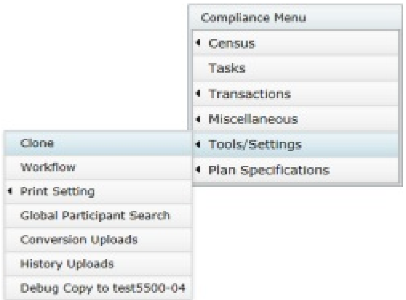
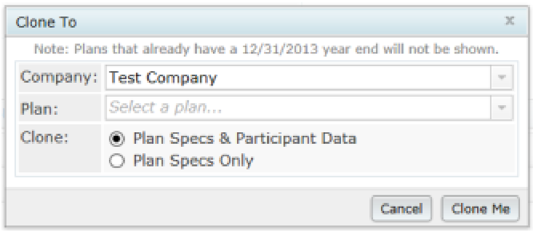
The “Clone” feature allows you to make an exact copy of a plan, within the Compliance software. You will first need to add a plan to the database - this will be the destination plan; you may clone plan specifications only, or both plan specifications and participant data.

- Clone Plan Specs and Participant Data – in addition to copying plan parameters, investment accounts and sources, census data, transaction batches and participant loans will also be copied.
- Clone Plan Specs Only – this will copy plan specifications for the current plan year, including plan parameters, investment accounts and sources. Please note that census data, transactions and loans will not be copied with this option.

The “Clone feature” is located in the Compliance Menu, under “Tools/Settings”.





The “Clone Me” feature will create a copy of the plan Compliance module data to another plan. Below are the suggested steps to clone a plan year end.

1. Create the destination plan – the plan that you wish to copy the original plan to.
2. Select the original plan and go to the Compliance software.
3. Click the “Clone” link
4. Select the Company and Plan you wish to copy the existing plan to.
5. Select “Clone Plan Specs only” or “Clone Plan Specs and Participant Data”.
6. When you see “Plan is cloned”, return to the previous screen.
7. Navigate to the clone.
8. If you cloned participant data you will need to run the data scrub, allocations & testing.