QS Part 2: Compliance Menu - Plan Specifications

06/26/2025 1:18 pm CDT

The first time in the module you land on the Plan Specifications page with the Sources & Investment accounts section expanded. After the first time you can go to the Plan Specifications from the Compliance Menu box at the top of the screen, hover over "Plan Specifications"; click on "Edit". Expand one section or all the sections. Review each section and update as required.