

Default Plan Feature

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The Default Plan feature allows you to streamline adding plans by designating a specific company and plan(s) as your primary choice. You can create an unlimited number of default plan checklists for the same plan type. For example, you can have multiple Default Plans with various provisions for the Non-Standardized 401(k) (Adoption Agreement Format).

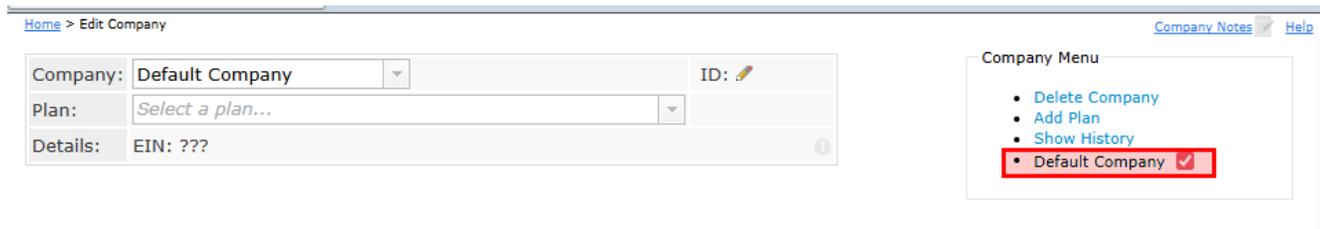
Follow the steps below to set up and begin using this feature efficiently.

Step 1: Add a Company

Add a new company to your account. Be sure to provide a name that clearly identifies this company as the default for easy recognition in future steps.

Step 2: Select Default Company

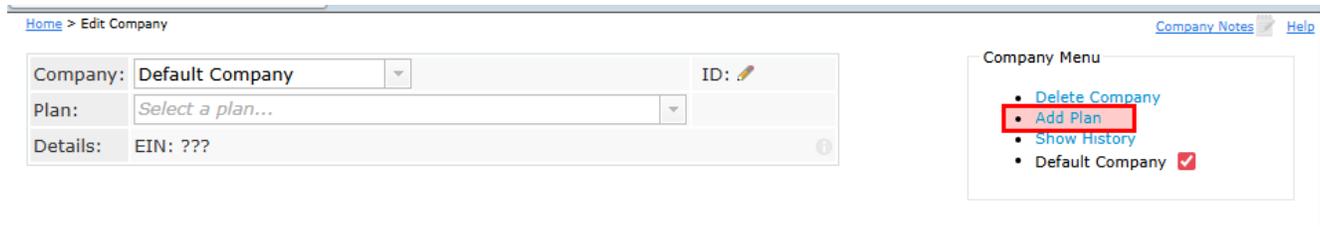
Once the company has been added, select the company as the "Default Company" by checking the box under the Company Menu. This ensures that all plans under this company will appear in the list of default options when adding a new plan to your account.



The screenshot shows the 'Edit Company' page. On the left, there is a form with the following fields: 'Company:' with a dropdown menu set to 'Default Company', 'ID:' with an edit icon, 'Plan:' with a dropdown menu set to 'Select a plan...', and 'Details:' with 'EIN: ???'. On the right, there is a 'Company Menu' box containing a list of options: 'Delete Company', 'Add Plan', 'Show History', and 'Default Company'. The 'Default Company' option is highlighted with a red box and has a checkmark next to it.

Step 3: Add a Plan

Within the default company, on the Edit Company page, you can add plans via the "Add Plan" link located under the Company Menu. As with the company, provide a name for the plan that makes it easy to identify as your default plan.



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You could also choose to clone an existing plan on your account to your default company. For the steps to clone a plan, please refer to Plan Menu, article Clone Plan within the Documents User Guide.

Step 4: Begin Using the Default Plan Feature

Now when you go to add a plan to your account via the "Add Plan" feature, you can select a plan to pull default values from.

First select your desired plan checklist, then at the bottom of the page, you can choose your default plan and click the "Add Plan" button.

NOTE: "Standard ZZZ Default" will pull from the ZZZ-Default for the plan type selected.

Select a Checklist:	
Defined Contribution:	<input type="radio"/> Employee Stock Ownership Plan w/ 401(k) - POST <input type="radio"/> Governmental Money Purchase - POST <input type="radio"/> Governmental Profit Sharing - POST <input checked="" type="radio"/> Non-Standardized 401(k) (Adoption Agreement Format) - POST <input type="radio"/> Non-Standardized 401(k) (Adoption Agreement Format) - POST (Answers Only) <input type="radio"/> Non-Standardized 401(k) (Individually Designed Format) - POST <input type="radio"/> Non-Standardized Money Purchase - POST <input type="radio"/> Non-Standardized Target Benefit - POST * Not offered starting with Cycle 4 <input type="radio"/> Standardized 401(k) (Adoption Agreement Format) - POST
Defined Benefit:	<input type="radio"/> Cash Balance Plan (ID Format) - Cycle 3 <input type="radio"/> Cash Balance Plan (Adoption Agreement Format) - Cycle 3 <input type="radio"/> Defined Benefit Pension Plan (ID Format) - Cycle 3 <input type="radio"/> Defined Benefit Pension Plan (Adoption Agreement Format) - Cycle 3
Section 403(b):	<input type="radio"/> Non-Standardized 403(b) Church with RIA - Cycle 2 <input type="radio"/> Non-Standardized 403(b) Church without RIA - Cycle 2 <input type="radio"/> Non-Standardized 403(b) Deferral Only 501(c)(3) - Cycle 2 <input type="radio"/> Non-Standardized 403(b) ERISA - Cycle 2 <input type="radio"/> Non-Standardized 403(b) Governmental - Cycle 2
Welfare plans:	<input type="radio"/> Cafeteria IDP Plan <input type="radio"/> Cafeteria Plan <input type="radio"/> Health Reimbursement Arrangement <input type="radio"/> Premium Only Plan <input type="radio"/> QSEHRA Plan <input type="radio"/> Trans Spend Acct <input type="radio"/> Wrap Plan
Non qualified plans:	<input type="radio"/> Section 409A Plan <input type="radio"/> Section 457(b) Plan
Other:	<input type="radio"/> Misc (1099, 5500 or Compliance)

Select a plan to pull default values from:	
Default:	<div style="border: 1px solid black; padding: 2px;"><input type="text" value="Standard ZZZ Default"/> ▼</div> <div style="border: 1px solid black; padding: 2px; margin-top: 2px;"><input type="text" value="Standard ZZZ Default"/> <input type="text" value="Default 401(k) Non-Std Plan - PT Format - Post PPA"/> <input type="text" value="Default Company 401(k) Safe Harbor Plan - POST"/></div>
Add Plan	

All default options in your default plan will populate in the new plan just added.