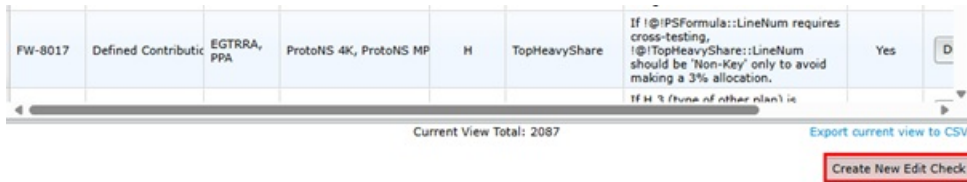


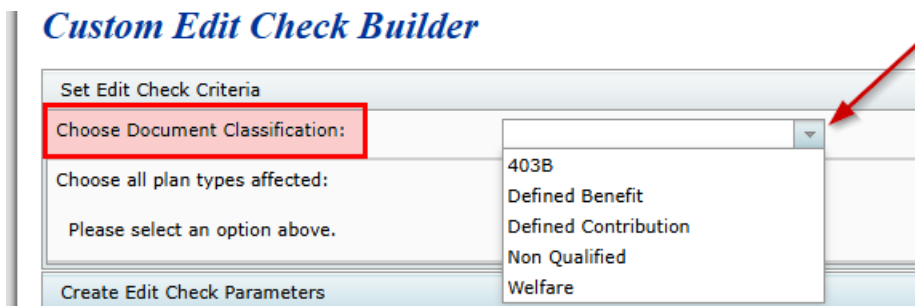
Creating a New Custom Edit Check

04/30/2026 4:18 pm CDT

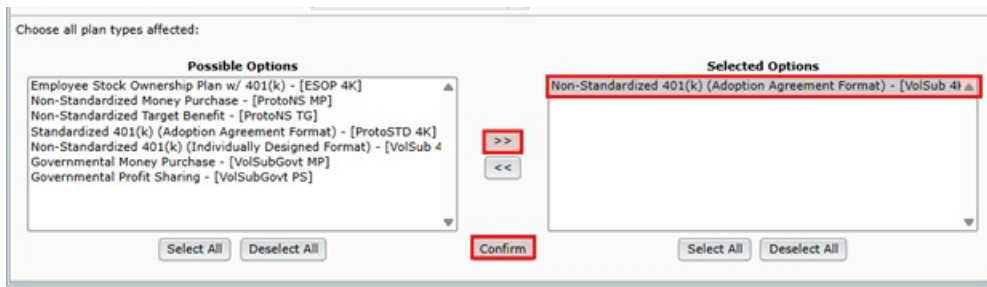
To create a new custom edit check, click on the "Create New Edit Check" button located below the dashboard.



Choose Document Classification: From the drop-down select the document type to which the edit check will apply. Only one type may be selected per custom edit check.



Choose all plan types affected: Specify which plan types (e.g., 401(k), Profit Sharing) the edit check should affect. To select multiple plan types, click on the plan type and Ctrl on your keyboard at the same time. You can also use the "Select All" button located under the "Possible Options" box. Click on the arrow button to move the plan type to the Selected Options box. When you are finished click on the Confirm button.



Create Edit Check Parameters: Choose the data fields and set conditions to create the edit check. Below is a description of each data field.

1. **Filter by Section:** Select from the drop-down the section of the checklist that the edit check will apply to (e.g. A).
2. **Apply to Group:** This is where you can determine the logic in relation to the criteria of the edit check. For a simple edit check with only one field and one value, the group number is not relevant. The grouping will determine if any (AND) or any (OR) conditions must be met involving multiple fields or values. Creating complex logic will be explained in greater detail below under Values.
3. **Field Name:** Select the name of the field from the drop-down that the edit check will look at. Only applicable fields to the plan type selected will be available.
4. **Condition:** From the drop-down select the condition to apply to the field name. *Options include Less than, Equals, Not equal, Greater than, Less than, Greater or equal to, or Equal to.*
5. **Value:** To select one option, click on the given value, then click on the "Add Line" button. To select multiple options, hold the Ctrl button on your keyboard, at the same time select multiple options from the list. **NOTE: Selecting multiple options in a list will have "or" relationship logic.**

You can also add a value manually. The value can be numeric, alpha character or special character. After adding a value manually, click on the "Add" button to display the amount entered in box below the "Value" field. Click on the "Add Line" button to add the check to the Display Edit Check Parameters. You may now add another value and click on the "Add" button again, followed by "Add Line" when finished.

Display Edit Check Parameters: This will display your custom edit checks created after clicking on the "Add Line" button. If more than one line has been added, the lines will have an "and" or an "or" relationship based on the grouping and method of adding.

IF everything in Group 1 is True:			
PlanLine1	Equals	None	Delete
AND PlanNumber	Equals	None	Delete

Set Edit Check Error Criteria

Set Edit Check Error Criteria

1 Section: A 2 Go to Field: PlanNumber 3 Error Type: Error 4 Custom Error ID:

5 Display Message: Enter the edit check error message here

Create EditCheck Reset Cancel

1. **Section:** Select the section that the edit check applies to (e.g. A).
2. **Go to Field:** Select the field that the user will be directed to when the error or warning message is received.
3. **Error Type:** Designate whether the edit check is classified as a warning or an error.
4. **Warning:** Alert the user but allows completion. These will be highlighted in yellow.
5. **Error:** Alerts the user that the selection does not pass. These will be highlighted in red.
6. **Custom Error ID:** This is where you can enter an identification number specific to the edit check. The value can be numeric, alpha character or combination of both. You can use the same error ID for all edit checks or use a unique ID for every edit check.
7. **Display Message:** Enter language here to alert the user of edit check warning or error.

Create Edit Check: Click this button to save the edit check and return to the Custom Edit Check Dashboard.

Reset: Click this button to reset and start over creating a custom edit check. **Cancel:** Click this button to cancel creating the edit check and return to the Custom Edit Check Dashboard.
